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# Deep Value Assessment

How ongoing, participatory employability assessments could improve outcomes for jobseekers



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### Community Links

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## Summary

Every public service relies on effective assessment – to target resources, determine eligibility, and ensure people get the best service possible. Properly understanding jobseekers' needs and abilities is crucial to the success of employment support services in helping people into long-term, sustainable jobs. It allows employment support services to be tailored and responsive to jobseekers' widely varying situations, but it also has the potential to ensure they feel valued, and are understood as empowered individuals actively contributing to their own progress towards work.

Jobseeker assessment serves several purposes for jobseekers: from determining benefit eligibility to tailoring employment support packages. This report looks at employability-focused assessments, which are primarily about ensuring quality employment support. Such assessments are essential for deciding what support jobseekers need, determining what externally-contracted provision they are sent to, setting payment levels for external providers, and setting conditionality requirements on a jobseekers' claim.

Every year, Community Links works with thousands of jobseekers through our employment and training service and our benefits advice service. We undertake assessment of jobseekers in each of our services and use this to tailor the support that we provide. We also see the consequences of failing to properly assess jobseekers: claimants who come to us after they've been sanctioned often say their sanction was due to conditions being attached to their claim which were unsuitable for their personal circumstances.

These experiences have prompted us to look in-depth at how to improve the way jobseekers' needs and abilities are assessed. We conducted interviews and focus groups with benefit claimants and staff at a range of jobcentres and Work Programme providers across east London. We have complemented this with a review of literature analysing assessment in other sectors.

This report presents the key findings from this work. We plan to follow-up our research with a wider assessment of the role of jobcentres and employment support services.

### A new approach to employability assessments

The research highlights a clear need for change in the way assessment is carried out. On the basis of our findings we have developed two key principles underpinning a new approach to assessing employability. Both of these ultimately rely on advisors having more time to work:

**Firstly, assessment should be an ongoing process.** To get an accurate, in-depth picture of a jobseeker's situation requires continually updating the assessment. Our research has shown that attempts to segment customers upfront into different 'streams' of support are unlikely to be successful, as successful assessment relies on a strong, trusting relationship to be built between advisor and jobseeker over time. It is important that advisors have the time and resources to build these relationships and use them to continuously assess needs and tailor support appropriately.

**Secondly, jobseeker assessment should take more account of jobseekers own perspectives.** Jobseekers understand their own needs and abilities better than anyone. They should be put on a more equal footing with their advisors, to allow them to actively contribute to their assessment and thus shape their support offer. A more participatory assessment would also encourage employment support to include a consideration of jobseekers' strengths and abilities, instead of just addressing their barriers and needs. Focusing on understanding what the customer can do - and wants to do - would encourage them to build on their strengths, and help prevent a decrease in confidence.

## Four areas for improvement

This research has highlighted four areas in which these principles can be put into practice. If we got these areas right, customers would receive more accurate assessment and consequently better support; employment support providers could also achieve better results.

### Processes and tools

The process of assessment is crucial. Jobseekers told us there were big differences in the way assessments are being carried out. Some were assessed at the start of their claims, others felt they were unaware they had been assessed until further down the line. Most felt that not enough quality time was taken up-front to understand their situation. People appreciated ongoing assessment. Processes which involved regularly checking in on progress were popular.

The tools that are used also matter. People feel disempowered by formulaic, 'tick-box' assessment tools which remove the human, personal aspect of relationships with advisors. Jobseekers are very aware of their own needs and abilities, and they know when these are not being understood by employment support providers. Advisors and jobseekers alike expressed frustration about how information from assessments can be lost – because of poor IT systems which are unable to record all necessary information, or because processes are not in place to share information between providers.

A target-driven culture within provider organisations makes it difficult to undertake objective assessment of needs. Staff can feel constrained about how they assess people's needs when they are aware of targets based on how many people should receive particular forms of support. Finally, improving assessment processes will not help unless there are adequate support offers in place afterwards. Many respondents highlighted how, while there was good provision in place for many, those with the largest and most complex barriers found it harder to receive appropriate support.

**1. Assessments should be reviewed and updated on an ongoing basis, so that claimants' changing circumstances are properly understood, and decisions about forms of support are made accordingly.**

a) Guidance should make clear that the Claimant Commitment must be a live document which coaches and jobseekers can update when necessary, rather than only at infrequent reviews.

b) Information from a range of sources should be used to update assessments. In particular feedback from internal or external providers of specific support (such as workshops, training courses) should be fed through and properly documented so that it can be referenced and utilised by advisors.

**2. JCP and Work Programme providers should move towards a more collaborative, participatory form of assessment.** The Claimant Commitment offers a good example of this and its forthcoming evaluation should ask jobseekers the extent to which they feel they could influence their commitments. Based on this evaluation, additional staff training and guidance should be put in place to ensure claimants are meaningfully inputting into their assessments.

**3. Assessment of jobseekers should take more of a strength-based approach.** This would involve focusing more on people's abilities, rather than just their barriers to work. Guidance should be developed to ensure the Claimant Commitment focuses on such strengths, and these should inform what types of support people are offered.

**4. At a basic level, tools and systems must be able to collect the range of situations and present these in an ongoing way.** JCP and WP providers should review their systems for collecting and recording customer information to ensure that information about barriers such as homelessness, childcare and transport are always collected and always used to inform ongoing support.

## Partnerships

In a complex employment support system with many organisations and contracted services, strong partnerships are essential. Staff from both JCP and Work Programme providers are keen to strengthen partnerships with each other, but are currently stymied by the perennial problems of information-sharing systems and time pressures.

Similarly, staff are very aware of the benefits of working more with local voluntary and community organisations, but a lack of time stops them being able to do so effectively. Improved communications between different providers of employment support would allow assessments to be updated even as jobseekers are passed between different provider organisations. This should avoid having to repeat the assessment, which can feel disempowering for jobseekers.

**5. Information about customers' strengths, abilities and barriers should be shared between JCP and WP advisors, to smooth out assessment processes and avoid duplication. This includes sharing documents such as the Claimant Commitment, something recommended by the Oakley review of Jobseeker Sanctions. In the long-term, this should also include data sharing agreements; in the immediate term, JCP advisors should ask customers for permission to send key information to WP providers upon referral.**

**6. 'Warm handovers' should be implemented between JCP and contracted employment provision, so as to minimise duplication of assessment. Aligned and improved Customer Management Systems, together with data sharing mechanisms, can help with this.**

**7. 'Lead advisors' should ensure that staff at all levels can network and build a good working knowledge of available local provision to refer to. Once customers have been referred to internal or contracted provision, advisors should stay in touch with the provider and use evaluative information to further improve assessment of the customer's strengths and needs.**

## Staff

Frontline staff are key to ensuring assessment works. Currently a lack of time and resources, can often means advisors are unable to provide the thorough and on-going assessment claimants require.

The research showed that advisors are keen for more training, both to be able to use assessment tools more effectively and be able to develop the strong relationships that encourage disclosure and enable strong assessment to take place.

Specialist lone parent and disability advisors are no longer a common feature of jobcentres, and instead it seems that steps have been taken to ensure that all advisors have a broad understanding of the barriers jobseekers face when looking for work, including more complex and specialist issues. Whilst the introduction of advisors who have specialist knowledge of certain issues as part of the JCP Social Justice Agenda is welcomed, the research showed that more could be done to ensure that groups with unique circumstances and needs – such as lone parenthood – are properly catered for.

### **8. JCP and WP providers should provide additional training to encourage staff to undertake ongoing assessment of customers' strengths and needs**

a) JCP should receive further guidance about the discretion they can use in their approach with jobseekers, and the importance of proper and full assessment to enable such an approach to be taken.

b) Some of this training should focus on enabling staff to handle more sensitive and specialist issues that may arise through assessments. Advisors identified as supporting specialist needs through the JCP Social Justice agenda are welcomed, but they must be trained properly and competent at supporting other members of the team on these issues.

c) JCP and WP providers should ensure they facilitate uptake of such training and should utilise feedback from customers to identify staff who might benefit from training in assessment.

### **9. Jobcentres and Work Programme providers alike should appoint 'Lead Advisors' for specific areas (such as disabilities, mental health, etc).**

a) Other advisors should feel confident to ask for support from these individuals and given time to seek appropriate advice.

b) These lead advisors should be responsible for building partnerships at district level to allow for good understanding of different customer groups' needs, strengths and barriers, as well as local referral options and means of providing support.

## Relationships

Deep Value relationships between jobseekers and their advisors are essential. The term 'Deep Value' captures 'the value created when the human relationships between people delivering and using public services are effective' (Bell and Smerdon 2011). Jobseekers were very clear about how strong, trusting relationships are crucial to encouraging disclosure of information. Community Links has previously written about how 'strong human relationships between public servants and clients can nourish confidence, trust and self-belief', making it more likely that information will be shared and that problems will be uncovered (Council on Social Action 2009). Giving advisors the time and discretion to create these relationships and to interact with customers on a human level would lead to much more accurate and ultimately useful assessments. Some current practices, such as group inductions to some employment programmes, prevent these relationships from forming. However, the recent introduction of the Claimant Commitment in JCP has the potential to really change the culture and encourage much stronger relationships to be built and used for assessment.

Jobseekers find that the one-sided nature of employment support can be a real barrier to developing strong relationships and to revealing their own needs and strengths. Participatory approaches to assessment, by which jobseekers can be involved in an equal and reciprocal relationship with professionals and work together to get things done, can encourage the formation of these relationships. Making sure jobseekers feel ownership over their assessment, and that they can build a strong, trusting relationship with a personal advisor is crucial. Adopting a more participatory also ensure that customers are informed about assessments that have been made and their implications.

10. In order to allow for more empowering, participatory ways of doing assessment, **advisors and jobseekers should be encouraged to develop stronger, Deep Value relationships.** This should make jobseekers more likely to disclose strengths and barriers, and to improve overall assessment.

a) Changes which may enable the development of such Deep Value relationships should be trialled - including allowing jobseekers to choose which advisor supports them; or reducing advisors' responsibility for enforcing conditionality.

## Introduction

Every public service relies on effective assessment. Assessment is used to target resources, determine who is eligible for support and to ensure people get the most appropriate service possible. Evidence from across many different areas of public service – including older people’s care, nursing, and the employment support sector<sup>1</sup> – shows that it plays a fundamental role in making services effective and successful.

Services for unemployed people are no exception: assessment is used for determining eligibility for out-of-work benefits, for targeting resources, identifying those who need the most support, and tailoring employment support services to individuals’ needs. This report focuses on employability assessment: understanding jobseekers’ needs and abilities as part of supporting them into long-term, sustainable work. It does not look at assessment of eligibility for benefits.

This report explores how current employability assessment processes are working and develops suggestions for their improvement. Based on research with jobseekers and employment support advisors, it looks at four aspects of current assessment practice and makes recommendations for how employability assessment could be improved. This report does not seek to explore the process for segmentation in detail – rather we focus on the types of relationship and processes which currently exist and explore how they could be improved for the benefit of all involved.

Community Links works with thousands of jobseekers every year through our employment and training service and our benefits advice service. We undertake assessment of jobseekers in each of our services and use this to tailor the support that we provide. We see the consequences of failing to properly assess jobseekers: claimants who come to us after they’ve been sanctioned often say their sanction was due to conditions being attached to their

1 (Challis et al, 2004), nursing (Blackburn et al, 2004), or the employment support sector (Coleman and Parry 2011; Bimrose et al 2007; Productivity Commission 2002)

claim which were unsuitable for their personal circumstances. We also understand how challenging it can be to carry out full in-depth assessments when there is little time or flexibility in the scope of contracts to do so.

Social security for working-age people has become increasingly work-focused over the past two decades. People in a wide range of situations – including those with disabilities, young children or with other barriers to work – are expected to engage in “work-focused activity” in return for state benefits. As a result, jobseekers with very different backgrounds and in very different situations are increasingly expected to move towards the same goal.

Currently however, far too many of the people facing the greatest barriers to the labour market remain unemployed for far too long. The Work Programme is continuing to fail jobseekers who face the largest barriers to entering work, and Jobcentre Plus (JCP) has introduced new programmes for people who have still not found a job after two years on the Work Programme.

Effective assessment of jobseekers’ needs and abilities is key to addressing this problem and ensuring the success of employment support services in helping people into sustainable jobs. Just as diagnosis in health provision is fundamental to deciding what form of treatment should be given, effective employment support relies on properly understanding jobseekers’ barriers. No matter how well-designed the support received, if it does not reflect jobseekers’ strengths and recognise the barriers they need to overcome, it is unlikely to be successful in moving people towards the labour market.

Approaches to assessing jobseekers in the UK have been increasingly criticised in recent years. Several organisations have argued for new approaches to assessment that are holistic, simpler and occur earlier in the process.<sup>2</sup> The

2 For example, Shaw Trust (2013) have argued that a key part of future disability employment service must be “a simple triage assessment of customers’ employability and holistic needs, to ensure they are directed to the most appropriate employment support programme”. The Employment-Related Services Association (2013) recommended, based on a consultation of 90 of their members, that a needs assessment should be introduced on day one of a jobseeker’s claim. It should be made up of 10-15 questions and co-designed by

Work and Pensions Select committee (2014) have criticised the quality of the Department for Work and Pensions' (DWP) assessment practices. They recommended that more ongoing assessment should be undertaken and that regular updates are passed from Jobcentre Plus to contracted providers. Hitherto DWP has segmented claimants based on their benefit history which, although a relatively blunt instrument, has been easy to apply. The Work and Pensions Select Committee, among others, has recommended that this is replaced with a segmentation tool which would estimate how far from the labour market each claimant is and thus triage them into different streams of support.

There have been several recent attempts by DWP to improve assessment tools which identify claimants' barriers to employment. Various segmentation tools have been trialled with little success. Whilst not explicitly an assessment tool, the recently introduced Claimant Commitment (formerly the Jobseekers' Agreement) outlines the job seeking actions a claimant must carry out while receiving Jobseekers' Allowance (DWP, 2013). The ongoing introduction of the Claimant Commitment is underpinned by a policy intent to change the relationship between employment advisors and claimants – giving jobseekers more space to input into their assessments and action plans. However, there remains little clarity about which approach works best to assess claimants' barriers, or how best to change assessment practices in order to improve the overall system.

The next chapter sets out the background: looking at what lessons can be taken from different approaches to employability assessment, and from assessments outside of the employment sector. From the literature, we identify four areas which could be changed to improve employability assessment practices:

JCP and Work Programme providers. Meanwhile NCVO have recognised that a "significant shift" is required in order for back-to-work support to meet the needs of those with the largest barriers (Suleiman, 2014). They recommend that an "early and detailed assessment" of jobseekers strengths and needs occurs within JCP and before referral to contracted employment support. This assessment should be used to determine the type of programme that claimants are placed on. Policy Exchange (Miscampbell 2014) echoes this and recommend that a reformed JCP undertake assessment early on, using data from other sources (such as social services, education, etc.) wherever possible.

processes; partnerships between providers; staff; and relationships. Experience from other sectors shows that all of these are essential to ensuring that specific, individualised needs are met and that employment provision is tailored accordingly.

The following chapters then report on findings from our primary research, looking in depth at each of these four areas in turn. Our findings show that experiences of assessment vary somewhat between jobseekers, yet across the board it appears that time and resources are key to making employability assessment work.

Our evidence points to two other ways to improve assessment: ensuring that it is ongoing, and increases jobseeker participation in assessment. The final chapter sets out practical recommendations for how these changes could be brought about.

## Methodology

Our research consisted of interviews and focus groups with benefit claimants and staff at a number of Jobcentre Plus (JCP) branches and Work Programme (WP) providers across East London.

We conducted 18 interviews and six focus groups with individuals at different stages in their employment support journey. The four key groups were:

- Individuals currently being supported by the JCP who had not yet found employment
- Individuals who had been supported into work by the JCP in the past six months
- Individuals currently being supported by the WP who had not yet found employment
- Individuals who had been supported into work by the WP in the past six months.

We also conducted two focus groups with advisors; the first with local Jobcentre Plus staff and the other with local Work Programme providers. These focused primarily on the role, process, and effectiveness of assessment. Finally we undertook interviews with five JCP and Work Programme managers.

## Background

Employability assessment is used for a number of different purposes including targeting resources at those who need the most support; tailoring employment support services to individuals' needs; and for setting conditionality upon benefit recipients' claims. This section includes a brief summary of the way assessment is currently applied in job centres and the Work Programme. It then seeks to draw lessons from the analysis of some of the different assessment approaches or tools used in employment and other sectors. It concludes by drawing out four key factors we believe should be addressed in order to improve assessment for jobseekers.

## Current jobseeker assessment practices

### Jobcentre Plus

Employability assessment currently happens at several different points for jobseekers. When someone initially 'signs on' with JCP they attend a work-focused 'new claimant interview' which lasts about 40 minutes. At this interview, the advisor builds up a picture of the customer's abilities, skills, experience and the barriers preventing them from finding work. Based on this assessment, an agreement is made as to what they will do to help themselves to get work, which is recorded in the recently-introduced Claimant Commitment (formerly the Jobseekers' Agreement) and is used to set conditions on their benefit claim. It is intended that the Claimant Commitment is updated at least every three months; and further assessment potentially occurs when the customer is referred to other programmes or support. The Claimant Commitment has begun to make assessments more participatory.

### Work Programme

After one year of claiming out-of-work benefits<sup>3</sup>, a jobseeker is referred to the Work Programme. Jobseekers are segmented into different Payment Groups, primarily on the basis of age or benefit

<sup>3</sup> In most cases this happens at one year, though some sets of jobseekers are referred more quickly to Work Programme than others.

type, which effectively sets the level of support that Work Programme providers are paid to give them. This relatively crude 'streaming' approach does not accurately build-up a picture of a claimant's needs, let alone their strengths and aspirations.

The Work Programme is contracted using a prime contractor and sub-contractor model. Prime providers will often have the first contact with customers before they are referred to other sub-contractors, primes will often undertake a brief assessment to determine what kind of support customers need and whether a specialist provider would be useful.

The Work Programme operates with a 'black box' approach which gives providers much flexibility to design their programmes based on their own expertise and specialisms, and contract elements of delivery to other well-placed organisations rather than delivering specified services. As such, there are no pre-defined assessment processes once jobseekers join the Work Programme. Instead, providers are free to assess customer needs and abilities and arrange an appropriate programme of support in any way they wish. However, official guidance states that assessment should be conducted at an early stage.

## Differences in approaches to employability assessment.

A huge range of different approaches to assessing jobseekers' needs have been attempted in the UK and internationally. These vary in a number of ways:

### 1. The overall 'aim' of the assessment.

Employability assessments differ in their overall purpose, and this has a strong effect on how they operate. Some assessments focus on segmenting jobseekers into different programmes of support or different payment levels for outsourced services. The Australian JSCI tool (see Box pg. 13) is a good example of a tool focused on segmentation. On the other hand, some forms of assessment – such as the Core Self-Evaluation Scale (see Box pg. 13) – do not necessarily aim to segment people but are rather used to inform provision of support in a more ongoing way. Tools

## Danish Employability Profiling Toolbox

### What it aims to do

The Danish Employability Profiling Toolbox aims to identify suitable support for individual jobseekers by utilising a set of four tools, with input from both advisors and the jobseekers.

### How it works

The process can be broadly split into two stages. The first stage involves a preparation leaflet for the jobseeker that details their rights and responsibilities, a public assistance record with an overview of the jobseekers' employment history and a 'job barometer' that measures the likelihood of them finding employment in the following six months. The job barometer has an accuracy of 66%, thus making it comparable to Irish and British statistical tools (O'Connell et al, 2012).

The second stage uses all of the information from the first stage to inform a meeting between the personal advisor and the jobseeker. To supplement this, a dialogue guide is provided to help the interview focus on five key themes: the jobseekers perspective on

the labour market, their qualifications, their personal skills, their financial situation and networks, and their health (EPT, 2005).

A segmentation process then allocates the jobseeker into one of five groups, indicating the intensity and type of support required.

### Strengths and Weaknesses

The process uses a wide range of information and is designed to allow flexible assessment; for example the weighting of each topic in the interview will depend on information garnered from the other tools. However, the EPT produces significant documentation, which places great time pressures on advisors, and its success is difficult to measure (Larsen & Birgitte, 2011).

### Key learning

Multi-method approaches such as this that utilise a range of tools provide an opportunity to conduct an in-depth assessment that is tailored depending on particular characteristics. The statistical element must not be used in isolation, but instead supplements other tools to ensure specialised assessment.

which do not aim to segment people into different streams of support tend to be able to incorporate a more iterative approach to assessment.

**2. The extent to which advisor discretion is allowed.** Assessment tools can be seen as lying along a continuum between following strict rules that bind advisors at one end, and allowing complete advisor discretion at the other (Coleman and Parry, 2011). Tools can be developed that support advisors to use their own judgement: for example the Danish Employability Profiling Toolbox allows advisors to weight different parts of the assessment tool differently, depending on which they see as most relevant to the customer. Without allowing some advisory discretion, it can be hard for 'rules' to be devised which are complex enough to recognise the diversity of need among jobseekers (Bimrose et al, 2007).

**3. The extent to which the tool relies on statistics rather the personal approaches.** Statistical modelling approaches gather data from

various sources and use it to predict the length of time that a claimant may remain unemployed, or the likelihood of a particular intervention working. The best-known statistical assessment tool for jobseekers is the Australian Jobseekers Classification Instrument (JSCI, see box pg 13), the potential of which has been briefly explored in the UK (Matty, 2013). In general, statistical modelling approaches struggle to achieve high rates of success (Bimrose et al 2007), and the results of early misclassification can be harmful for jobseekers who receive inappropriate support. There are also concerns as to advisor buy-in; in a randomised control trial, Behnke et al (2007) found that advisors tend to ignore the tool and rely wholly on their own judgement which illustrates the importance of appropriate incentives to ensure advisor buy-in.

Some tools build on the idea that strong human relationships make it more likely that information will be shared and that underlying issues are identified. Community Links has written about the

## Jobseeker Classification Instrument (JSCI)

### What it aims to do

The JSCI is an Australian profiling tool introduced in 1998 that measures an individual's relative chance of remaining unemployed for a twelve month period.

### How it works

The tool uses 18 factors, including *demographic information* such as age, gender and ethnicity, *attribute information* such as educational attainment, and *personal information* such as living circumstances. The process largely involves a standardised set of questions at the start of the claim process that leaves very little open to interpretation. Those who score higher than 24 points are deemed 'high risk' and are put on intensive support.

### Strengths and Weaknesses

The tool was found to be approximately 90% accurate in identifying the correct support for jobseekers (Lipp, 2005).

The tool is not very flexible and doesn't necessarily take into account qualitative information about a jobseekers situation. However, as certain types of information required in the JSCI are of a sensitive nature (and eligibility is measured at the same time), non-disclosure of information can lead to misclassification. Additionally, whilst the Productivity Commission's (2002) evaluation argued that the JSCI has a fundamental role to play in Australia's employment support sector; this does not mean it could not be refined.

### Key learning

There are two key points to be made about this tool; firstly, it raises an important issue about mutuality and trust between advisor and customer: a fundamental part of successful assessment. Secondly, it highlights the importance of provider understanding of a tool's purpose as, '*it is not intended to be a highly accurate individual diagnostic tool*' (Productivity Commission, 2002).

importance of these 'Deep Value' relationships in other sectors for 'nourishing confidence, trust and self-belief' (Council on Social Action, 2009). Some assessment tools rely on these Deep Value relationships to allow more personal approaches, whereby employment specialists assess using their professional opinion on jobseekers' needs and abilities. An important aspect of the Danish Employability Profiling Toolbox is that jobseekers and advisors meet together after an initial 'statistical' assessment has been made, and on the basis of this interview the employment officer makes a specialist assessment which complements the statistical one. Mixed methods approaches like this are able to use a range of tools and therefore allow for a more flexible assessment.

### 4. The extent to which the assessment is one-off vs. ongoing.

Some tools aim to be one-off, with the outcome dictating which employment support stream jobseekers are directed into (see box left). On the other hand, assessment processes can aim to be more ongoing, continually building up a picture of jobseekers' needs and abilities. Trials of ongoing approaches that continually ask jobseekers to identify strengths and ways to act on them have had impressive success in helping people off benefits.<sup>4</sup>

### Lessons from other sectors

Assessment techniques used in other sectors offer a number of lessons that could be applied in employability assessments.

In social care, for example, the Single Assessment Process (SAP) demonstrates the importance of specialist involvement, person-centred approach, strong communications to avoid duplication, and a complaints mechanism in assessment. The SAP works in a tiered way – initially every client starts with a contact assessment of basic information; then depending on the outcomes, further assessment with various specialists can be undertaken (LCC, undated). There are clear channels for complaints and concerns to be raised. While the SAP structure

4. Source: [www.behaviouralinsights.co.uk/blogpost/new-bit-trial-results-helping-people-back-work](http://www.behaviouralinsights.co.uk/blogpost/new-bit-trial-results-helping-people-back-work)

aims to avoid duplication of assessment, an evaluation still found that this was held back by a lack of information sharing, an unevenness of commitment and acceptance of the process, and no meaningful standardisation of tools (Challis et al, 2007).

In the criminal justice sector, the **Offender Assessment System (OASys)** was introduced in the UK in 2002 and includes a mix of self-assessment by offenders and assessment driven by highly trained and qualified assessors (NPS, 2003). Utilising a variety of computer-based forms, OASys measures offending-related factors, risks of serious harm, and indicates the need for future assessment. The core assessment comprises 73 scored questions across 11 scales covering individual level and social factors (Moore, 2009).

The story of the OASys highlights the need for multi-level assessment and the use of a range of tools in conjunction with each other. It was found that certain scales within the tool, for example alcohol misuse, thinking and behaviour, and risk of serious harm, were less reliable than others (Morton, 2009). However, supplementing the OASys with two new and more specific tools improved predictions when combined with the OASys core assessment (Howard, 2009).

## Core Self-Evaluation Scale (CSES)

### What it aims to do

The CSES is an attitudinal tool that aims to ascertain an individual's suitability for certain job roles, rather than assessing barriers to finding employment.

### How it works

It measures four personality traits that are apparently strong indicators of job satisfaction and performance (Coleman & Parry, 2011); locus of control, emotional stability, self-esteem and generalised self-efficacy. The scale consists of 12 items and uses a five point scale to measure these.

### Strengths and Weaknesses

The tool was found to be reliable in measuring the four key personality traits (Judge et al, 2003)

### Key learning

Assessment is not just about what support is required to get people into work, but also what support they might require once they are in a job. Particularly important in this is attitudinal information.

## Journey to Employment Framework (JET) (Harries et al, 2014)

### What it aims to do

The JET framework has recently been developed in the UK with an aim to understand and measure the factors that affect young people's 'journey to work'.

### How it works

It uses a set of indicators which broadly fit into seven categories: personal circumstances, emotional capabilities, attitudes, employability skills, qualifications and training, experience and involvement, and career management skills. Measurements are carried out using a wide range of psychological, behavioural, and

specifically designed survey tools. There are a range of options for measuring each category.

### Strengths and Weaknesses

The assessment is extensive and flexible, but as it has only just been developed its effectiveness is unclear

### Key learning

This type of assessment takes into account several interacting factors and allows flexibility in collecting information and doing the assessments, which is likely to be important for those with heterogeneous and complex needs.

## Important factors for high quality assessment

Based on the range of evidence we have considered in this chapter, it is clear that there are several factors which are fundamental to ensuring effective employability assessments. These factors can broadly be grouped into four themes:

- Process
- Partnerships
- Staff
- Advisor-client relationships

### 1. Process

Policy makers should stop trying to find the one form of assessment that will act as a 'silver bullet'. There are too many interconnected factors that contribute to individual unemployment, including such things as personal characteristics, circumstances, needs, barriers, skills, attitudes and motivations (Coleman & Parry 2011). A **holistic and thorough approach** is therefore necessary to take all of these things into account; our findings show that using a range of tools and approaches can support accurate diagnoses. Statistical tools can go some way towards this, particularly as their key strength lies in compiling a range of different pieces of information, but as the Employability Profiling Toolbox (2005) notes: 'qualitative aspects may be of decisive importance ... to the jobseeker actually getting a job'. Hence, advisor discretion and a mix of different tools combined are likely to yield the best results. This could be extended by not just looking at needs, but also looking at **abilities**.

Assessment should also be **ongoing** – continually building up a picture of needs and abilities rather than being a one-off, snapshot in time. Finally, there is a need to ensure that **appropriate services are commissioned, along with clear routes of referral**. This would require much more effective communication between different service providers, and **local partnerships** that facilitate such referral arrangements (see below).

### 2. Partnerships

Communication between different providers, members of staff, and agencies is also very important. **Warm handovers** between different agencies can ensure that everybody in the process receives an accurate picture of the individual's situation. This rarely happens when jobseekers are referred from JCP to the Work Programme, and as detailed later in this report, getting this right can help ensure the customer receives a joined-up and effective service.

Furthermore, there is a need for continued refinement of the indicators used to support assessment; particularly statistical tools, (O'Connell et al, 2012). This would require better **data sharing** between different providers in order to ensure that ongoing assessments can continue to be updated even as jobseekers move between different sources of support.

### 3. Staff

Employment advisors must be **highly trained in assessment**, and some must have **specialised skills that relate to specific needs**; for example, people who focus on certain disabilities or drug and alcohol dependency (Coleman and Parry, 2011, Bimrose et al, 2007). By ensuring advisors are highly trained and that a range of tools can be used to aid their expert opinion we can minimise inaccurate diagnoses and ineffective support. Furthermore, with certain tools (particularly statistical models) there need to be **appropriate incentives** to encourage staff to use them to complement their personal judgement (Behnke et al, 2007).

### 4. Relationships

**Deep Value relationships** between jobseekers and personal advisors should be nurtured, especially if jobseekers are expected to divulge personal information and engage fully with employment support processes. Community Links has published elsewhere the key attributes which underpin Deep Value relationships – these are trust, empathy, non-judgement, understanding, collaboration, positivity and experience (Bell and Smerdon, 2011; Barbour

and Llanes, 2013). Together these attributes allow relationships to be effective, so that both parties can contribute to their assessment and so that, through the relationship, the assessment is as strong as possible.

These relationships should be **strong and trusting** and should also include an element of **mutuality**. For example, there could be a review process of the support that the jobseeker is receiving to ensure they are receiving the best possible assistance and their opinion is being taken into account. It would encourage greater 'ownership' of the plan for the jobseeker and help alleviate any feelings of disempowerment that many long-term unemployed people feel in their job search.

## Conclusion

This chapter has outlined some of the wide range of different approaches to assessment in the employment support sector and beyond. However, little evidence currently exists as to how well they could work in the employment sector, particularly in terms of securing high quality, suitable, and sustainable work. The following chapters aim to start bridging this gap.

## Four areas for improving employability assessment

Jobseekers themselves have the most direct experience of how effectively their needs and abilities have been assessed. This chapter sets out the evidence from primary research with over forty jobseekers as well as staff and managers from Jobcentre Plus and the Work Programme, which sought to understand how well current processes identify jobseekers' needs and abilities.

Our results show clearly the benefits of ongoing, participatory assessment practices – but they also show the need for change if all jobseekers are to be assessed in this way.

Time and resources emerge as the key factors which can underpin or undermine each of these four areas. Jobseekers and advisors alike bemoan the difficulties of properly assessing needs and abilities in such a resource-constrained environment:

*'I think they really need to spend more time thinking about what people want and need'*  
**JCP customer**

Having the right amount of time makes the difference between customers feeling like they have undergone a 'tick-box' exercise, and feeling they have been understood by an advisor with whom they have a genuine, human relationship. Having an appropriate amount of time can also ensure that advisors understand what specialist provision is available locally, and that they are well-networked. Staff also need time to update assessment information and review their customers' needs and barriers using tools and databases that can be shared easily with other providers.

Despite limitations imposed by time pressures, changes could be usefully made in each of the four areas of *processes, partnerships, staff, and relationships* mentioned in the previous chapter which, when taken together, could significantly improve how well jobseekers' needs and abilities are assessed.

Each of the four areas is discussed in more detail throughout this chapter which brings together evidence from jobseekers and staff. Getting these four factors right could mean that customers have a better experience of having their needs assessed, which should lead to better, more targeted support to look for work, and ultimately increase their chances of moving into long-term, sustainable employment. Successful assessment needs all four factors to be strong and working collaboratively.

### 1. Processes

Jobseekers' experiences of how assessment is conducted vary greatly from person to person. There are many different ways to approach assessment from the timing of when assessment takes place, to who undertakes it and how well they work with jobseekers throughout the process, the 'how' of assessment can be key to its success or failure.

#### Ongoing assessment

The data we collected highlighted that the timing of assessment is key to its success. It was generally accepted that assessments should happen at the beginning of a customer's journey and at a number of points throughout their period of unemployment, including when the customer is referred to another organisation. Advisors emphasised the importance of early assessment - as soon as customers were referred to the programme. They described this as a key time to ascertain detailed information about customers and to re-evaluate their goals and aspirations.

Ongoing assessment, which builds a detailed picture of an individual's strengths and needs over a period of time, is also vital. Our primary research identified the importance of ongoing assessment, especially from the perspective of front-line staff. JCP advisors in particular explained that they placed a significant emphasis on conducting on-going assessments - emphasising the continuous nature as something that often happened informally as relationships with advisors developed over time. JCP staff acknowledged that different advisors approached and guided assessment

processes differently based on a range of factors including their relationship with the customer and size of caseload. Staff explained that this was because an individual's circumstances can change dramatically between appointments, and sometimes there is a more pressing and immediate issue to support them with that takes the advisor's focus away from supporting the individual into work.

*'It's important because [sometimes] finding a job isn't the issue; it's trying to keep a roof over their head.'*

**JCP advisor**

JCP staff appeared to conceptualise assessment fairly loosely. It was viewed as an integral part of the package of support on offer, but it was often difficult for advisors to separate out what did and did not constitute assessment. For example, staff explained that sometimes having off-the-record relaxed conversations with customers felt to them like assessment as it was part of the way that they built a picture of who their customers were and what they might need.

Whilst staff felt that ongoing assessment happened, and was integral to the general approach to assessment, unfortunately jobseekers from both services expressed some concerns about whether needs and aspirations were revisited regularly and the extent to which their advisors were kept informed of their changing circumstances.

*'Maybe in the initial interview, I can't remember, they asked the details. But after that you just go there and sign in'*

**JCP customer**

So whilst ongoing assessment is clearly important and elements seemed to be embedded into support processes, it seemed that it was not always clear to jobseekers that their movement through a programme was documented and evaluated. Indeed, Work Programme staff in particular highlighted difficulties of having enough capacity and time to regularly carry out this type of ongoing, detailed assessment.

## Participatory assessment: using jobseekers' knowledge of their own needs and abilities

Jobseekers reported a good understanding of their own barriers to entering employment, and of how to address them. People mentioned a range of barriers – from structural barriers such as the range and amount of jobs available, to personal ones, particularly a lack of confidence or appropriate qualifications. Many people were aware of what they needed to help them address their barriers, as the following quotes indicate. One individual was aware of the need to obtain relevant experience and another knew that getting some training might help him achieve success.

*'It is difficult... you need to prove [you have the experience] ... before I was looking for a catering assistant [job] and I needed experience, it's why I went to do my voluntary work for the church, to cook for people. It was to have the experience.'*

**Work Programme customer**

*'After about two months, I started to think, right, I'm not getting the work I want to get - maybe I need to spend some time mentoring and developing myself in other ways and maybe get some training.'*

**JCP customer**

In addition to understanding their own needs clearly, jobseekers talked about their abilities and strengths. Jobseekers, especially those recently unemployed, could identify what they were good at and talked positively about the benefits of these attributes. They often talked about their abilities in terms of being able to speak the same language and 'play the same game' as employers.

*'I know how to dress, I know about professionalism, I know how to address people and I understand the nuance of a question.'*

**JCP customer**

The fact that jobseekers displayed such a strong understanding of their own needs and abilities indicates that there could be a benefit in taking their perspectives into account more. In fact, working more collaboratively with jobseekers from the outset could improve the quality and accuracy

of employability assessments and therefore drive better and arguably more sustainable outcomes. Indeed, some jobseekers argued that focusing on their strengths and passions could have improved the usefulness of their assessment. Respondents were disappointed that this had not happened.

*'They go through boxes and tick it off, what sort of work are you looking for, but I think if they went through with you what your strengths are, as well as your weaknesses, your passions, then that would have been better. That never happened...'* **Work Programme customer**

Interestingly, the longer people remained unemployed, the less able they were to discuss their personal strengths; and this coincided with a loss of confidence as a barrier to gaining employment. This suggests that employment support services could usefully do more to encourage people to focus on their strengths in order to maintain personal confidence.

Despite having a strong understanding of their own needs and abilities, most jobseekers reported that their opinions were not taken into account as much as they would have liked by Work Programme or JCP staff. Jobseekers reported that they wanted to be more involved in the process and given more opportunities to feed in their knowledge and understanding of their own situations to employment support staff.

*'They should listen to me because allegedly I'm a customer ... The JCP is the only place where they don't care at all what their customers think.'* **JCP customer**

JCP staff explained that processes of assessment within the institution had recently shifted towards being more mutual and with more onus on the customer to self-assess and disclose relevant information. Staff referenced the new Claimant Commitment as a positive change to the way that customer knowledge is taken on board during assessment and spoke positively about their hopes for the Claimant Commitment placing greater emphasis on the customer to steer and guide their own journey.

*'Since Claimant Commitment, assessment is working better. The advisor can focus on the customer rather than deliver one-size fits all type interviews. It's actually very much driven by what the customer needs and wants'*

**JCP manager**

## Assessment and classification tools

Many jobseekers reported that they found the tools used by advisors at both JCP and on the Work Programme formulaic and inflexible in terms of enabling them to comfortably disclose and discuss relevant issues. This inflexibility increased a sense of powerlessness on the part of jobseekers who again reported that this made them feel unable to fully participate in the assessment process.

*'I thought, you have an advisor and he is meant to listen to you and give you some training related to what you need, and to help you search and do a good CV, but it wasn't like this. They just tick pieces of paper.'*

**JCP customer**

Both JCP and Work Programme staff explained that they used a variety of tools to enable them to accurately identify what support customers might need. Advisors felt that tools which could be continuously updated and measure milestones were most useful to assist with ongoing assessment. There were some significant concerns amongst staff about the effectiveness of other tools and systems, especially with regards to their value in identifying and recording more complex needs throughout their journey back to work. Advisors tended not to favour the Customer Assessment Tool for example, because it could not be used to conduct ongoing assessments, as there was no way for it to be updated.

In contrast, Action Plans were viewed much more positively because advisors felt that they enabled them to measure milestones and build an accurate picture of jobseekers' situations over time. One advisor told us using these plans enabled him to create a good profile of his customers, 'like building a story or a map'. Furthermore, advisors reported that the iterative nature of action planning encouraged

more customer engagement in the job-seeking process. The Claimant Commitment was also viewed as helpful in supporting and strengthening agreed actions as well as ensuring compliance.

Both advisors and jobseekers felt some of the more ‘tick-box’ style tools did not work to achieve an enhanced understanding of needs and abilities. In fact, they were sometimes viewed as counter-productive or harmful because advisors could not input all of the necessary information; resulting in misleading pre-judgements about individual circumstances. For example, Work Programme advisors were critical of some of the triage assessments that prime providers undertook, the results of which are passed on to other providers and sub-contractors supporting the journey to employment. One advisor pointed out that there was only one box that could be ticked to indicate a health condition, with no opportunity to specify additional, important detail about what the health condition was or how it might affect the customer.

It was reported that although tick-box assessment tools could be easy to use, they were also easy to misuse, particularly within a target-driven culture.

*‘They asked me to pick three things that I wanted to do. I said [work] in a school which I’m still saying. And they made me pick sales, which I don’t want to do.’*

**JCP customer**

*‘You’d go through and tick the boxes. I ticked yes for the disability box and they asked ‘what’s that all about then’ and I said dyslexia - there are some things I can’t do, or I find quite hard to do. This was met with disdain and questioning about whether I really needed to include it on there. I’m not saying I can’t work, because I can - but if you put me in a job processing a lot of information each day, like with spreadsheets, I’m not going to be able to do that.’*

**JCP customer**

Finally, jobseekers were critical that tick-box tools did not encourage advisors to think meaningfully about what kind of support might be needed.

*‘There’s no interest in joining up the dots; ‘oh, if you’re going to be a small businessperson you might need this [course], that might be quite good for you’*

**JCP customer**

It is clear that assessment tools need to be able to store all relevant information. There was a general feeling from both Work Programme and Jobcentre Plus staff that current IT systems and tools were not sophisticated enough to create a detailed profile recording all necessary information on a person’s needs and barriers and this was highlighted particularly in relation to information about health and disability. One Work Programme Advisor said:

*‘I have a customer who is agoraphobic and it’s been useless. The system is useless for her. It doesn’t help people [to understand] her barriers at the moment which is physically opening her door.’*

**WP advisor**

## 2. Partnerships

The research highlighted the importance of building effective partnerships to ensure that customers receive the type and level of support they require. Organisations need to work together to create consistent customer journeys with useful referral routes and smooth transitions to other forms of support.

### Communication and information sharing

Communication emerged as a key barrier to ongoing assessment. Staff and jobseekers alike were frustrated that organisations did not talk to each other regularly and share assessment information. Customers were keen for advisors to have access to relevant information about assessments and support offered in the past, and to utilise this, even on other programmes. For example if a customer was referred to Work Programme, they did not want to have to undergo very basic assessments that they had already been documented by a JCP advisor.

Jobseekers were often critical of the limited information sharing they experienced, and the knock-on impacts this had on them taking positive steps forward.

*[advisors] never communicated with each other. They admitted their records weren't up to date'.*

#### **Work Programme customer**

Furthermore, staff were keen to see a 'smoothing out' of the transition processes from JCP to Work Programme, as it was clear that customer information sometimes got lost in the system. Work Programme advisors also raised concerns about the quality of the JCP assessment process. They reported that they were often sent inaccurate or incomplete information about customers at the point of referral. This meant that they subsequently had to spend time unnecessarily covering old ground and collecting very basic information about customers. Arguably this information should have been collected at the start of the process, often the point at which people are most engaged, for them to then build upon with more in-depth assessment.

Overall, it seemed that both organisations were keen to find ways to work together better. Suggested improvements to encourage ongoing assessment throughout the customer journey and between programmes could include introducing warm handovers at the point of referral, holding informal networking meetings for frontline staff, and committing to more regular communication and sharing of information. This would also be likely to help to reduce the current problem of duplication

#### **Referral routes**

Jobseekers were frustrated that the support on offer to them did not always match the needs and barriers which had been identified through assessments. This included not being able to access relevant training courses that might enable them to realise career ambitions, and in several cases, respondents were not given what they perceived to be suitable help to resolve other issues in their lives. For example, one respondent who was homeless at the time of the interview did not feel that he was given enough help to resolve his housing problem, nor enough empathy

or understanding from his advisor about what he was going through and the impact of this on his search for work. So whilst most people were pleased to have an opportunity to speak about the things they felt stopped them from moving into work, and the kind of support they might need to overcome these, they were disappointed when they felt that subsequent support offer did not address these needs. This was particularly true for what were perceived to be more expensive and specialist types of support and intervention.

*'They are constrained with what they can do, it's obvious. Sometimes it felt like we're just going through the motions.'*

#### **Work Programme customer**

*'They don't have many courses for seniors and professionals. They expect graduates and senior managers to go to the same training.'*

#### **JCP customer**

The frustration highlighted by jobseekers about the lack of effective and tailored support on offer was, on the whole, not matched by staff. Advisors from both Work Programme and JCP spoke positively about their ability to support and refer customers to external providers once needs and barriers had been identified. JCP in particular felt that referral routes had improved with the introduction of a new, localised database where details about local provision is updated, and through building the knowledge and capabilities of specialist issue advisors.

*'Assessment is exactly that, working out what people's needs are. Once we know that we can make some decisions about how to help people, whether that's in-house or using external partners. When you identify those who are little more complex you might want to bring in some expertise to help move those customers forward.'*

#### **JCP manager**

However, advisors recognised limitations to the support available. Some staff admitted that there were certain types of customers who had barriers which were very difficult to overcome within the confines of funding and programme structures. Very basic ESOL needs, serious health

conditions and learning disabilities were identified as barriers that staff found challenging to provide for, and some staff admitted that in they took steps to remove customers from programmes, by referring to another programme or supporting customers to apply for different benefits if they did not think they could be properly supported. Unfortunately this was not always successful, as one member of staff explained using an example of a customer with a learning disability who was unable to properly meet some of the basic requirements set out in his Jobseekers' Agreement and was refused for inactive benefits. Unfortunately the support she was able to refer to was not appropriate or tailored enough to meet his needs. Overall, staff felt that referral routes could be improved if they had more time to build relationships with local specialist support providers, and by improving induction and training process for new advisors.

### 3. Staff

Jobseekers spoke positively of the impact of being assessed by staff who are competent and confident in assessing customers' needs and abilities.

*'My advisors were very professional and set the expectations from the beginning through the Jobseekers' Agreement.'*

**JCP customer**

However, our research highlighted that there were significant differences in the quality of assessment practice which was largely dependent on the skills and experience of the advisor. Staff were keen for more training and of course more time and resources to carry out the level of assessment service they felt necessary.

#### Advisor differentiation

Jobseekers spoke about having very different experiences of being assessed and it seems that the quality of assessment which advisors undertook differed considerably. Some spoke about having very detailed discussions about their circumstances and journey back to work, especially when they started receiving support. Unfortunately others did not experience such in-depth assessment processes – in fact several

identified that they had not really undergone any kind of assessment at all. People were surprised to hear how positively, or indeed negatively, others talked about the issue in relation to their own experiences. The focus groups allowed comparisons which led to some feeling disappointed with the support they received, particularly when their peers had experienced more in-depth (or indeed more hands-off) approaches that were tailored to their individual needs. Respondents could also make comparisons with their own past experiences and several people were very aware of the role that chance played in getting assigned an experienced advisor.

*'The first [advisor], he tried to make sure that we'd discussed everything we needed to and he knew that I was looking for work quite seriously. The next two were box tickers... It was basically like sign here and see you again in a couple of weeks time.'*

**JCP customer**

*'I think [the experience] does depend on the advisor. You get some advisors... down there, there's a group of them - some of them are great, some of them are alright, and some of them not so. It depends on the person really.'*

**Work Programme customer**

Staff also acknowledged that a customer's experience of being assessed and getting appropriate support was very much dependent on the advisor and the relationship they are able to build.

*'I think we've got a fairly effective method of doing that [assessment] but it depends on the quality of the person doing the interview and it depends on the kind of information you're getting back from the customer at that point.'*

**JCP manager**

#### Training

Advisors from both JCP and the Work Programme felt that better training was essential. Advisors reported that they wanted more practical training on using tools and systems, as well as training in the general approach to assessment. Advisors reported that their busy workloads often

prevented them from undertaking training, and that it could be difficult to get managerial approval for training requests. Again this highlights the damaging impact of working within such short-term, tight financial and target-driven contexts, and not investing enough upfront for significant long-term benefits.

Training to use IT systems was specifically identified as a requirement by Work Programme advisors, some of whom use 'customer management systems' (CMS) to record information about customers. Staff thought that such training could increase staff ability to elicit information from customers and record it properly to guide support. Advisors reported more junior or less skilled advisors might struggle to use CMS effectively to diagnose more hidden or complex needs if they have not had appropriate training, and there was a common feeling that systems and tools were only as competent at making assessments as those using them.

*'Ultimately it's down to the person's competence with the IT. You've got to know the system quite well and how to make a smart action. You need to know what to write in your reviews and it requires a certain amount of training.'*

**Work Programme advisor**

Furthermore, staff felt that they could also learn more from each other and were generally keen to have more opportunities to share learning and ideas on how best to support customers. At JCP, the introduction of a group of advisors who specialised in supporting more complex needs, such as domestic violence has helped other advisors access up-to-date information and advice to support their customers' journeys. Managers were in support of encouraging their teams to work flexibly to enable knowledge sharing in the best possible way.

*'They [advisors] should have the freedom to work with their team and draw on the skills and experiences of others. We as managers should be supporting them to do this more.'*

**JCP manager**

## Time and resources

Time and resources were raised as key issues underpinning the different treatment that staff were able to provide, and whilst they emerged as barriers across the four themes, they came out most strongly in relation to staff workloads and flexibilities. Staff were clearly frustrated by the pressures of managing high caseloads with very limited time, as the following quotes demonstrate.

*'It's a constant balancing act - you've got to weigh up the time you give to someone trying to address their needs, being assessed, with the thought that 'you know I've got five people I could put into work this week' and focussing on them'*

**Work Programme advisor**

*'You've also got to bear in mind that advisor diaries are fairly full and have only a limited amount of time to be working with clients on assessments and they need to make sensible decisions about what they can do in the time they have available.'*

**JCP manager**

Staff admitted that heavy workloads made it difficult for them to always commit as much energy and resource to assessment as they would like. Moreover, they thought that they could offer a significantly better service if they had more time to build better relationships with local providers and could spend longer with each customer.

The research found that the increased flexibility within JCP which allows advisors to have more discretion about how they manage caseloads and tailor support for individuals had started to free up some advisor time, but not as much as advisors felt was necessary. Managers agreed that more steps could be taken to support advisors to spend the necessary amount of time with their customers, and reported that getting this right was mostly a structural problem. Furthermore, it was clear that without more upfront investment in the system, it would be difficult to re-arrange current working practices to free-up more advisor time. Having enough time was also highlighted as a challenge for Work Programme staff, with some

saying that they struggled to juggle tasks and responsibilities, especially in such highly target-driven environments.

*'It is like you are chasing your tail. So the moment you catch up with it you then have to start chasing it again. Because when you've freed up time for something else, another thing has been chucked in by somebody else who desperately needs your help.'*

#### **Work Programme advisor**

Another key theme which emerged from staff was the strain of working within a target-driven culture. Staff reported that this culture made it particularly challenging to provide adequately for some of the more vulnerable customers, which advisors were understandably upset about. Perverse targets were viewed as part of the problem here: as obstructive and sometimes harmful to customers – although staff agreed that they should be judged on performance in some capacity.

## **4. Relationships**

Strong relationships between jobseekers and personal advisors must be fostered if jobseekers are expected to divulge personal information and participate in assessment processes. Such Deep Value relationships would also improve assessment by making it more collaborative and participatory. Staff and jobseekers alike are keen to work together more and to overcome barriers and make decisions about support together.

### **Disclosure of information**

Jobseekers and advisors spoke of the importance of building strong and trusting relationships in order to obtain the relevant information at assessment which should help to guide appropriate support. One Work Programme advisor in particular highlighted the importance of trust in developing strong relationships, which understandably requires time and commitment.

*'I look at it like bricks and mortar really... you are putting one brick after another and that is definitely building trust.'*

#### **Work Programme advisor**

Some jobseekers found disclosing information about sensitive or complex issues very difficult when good relationships with staff had not been established. For example, one respondent described how embarrassed she had been to talk about an alcohol problem with an advisor with whom she had not built a trusted rapport. Likewise, an advisor discussed a customer who struggled to look for work after being sexually assaulted. The customer understandably found it difficult to discuss the issue and the advisor reported that she spent time getting to know the customer in detail before she stepped-up requirements for the customer to look for work.

Staff highlighted the challenges of working with customers who did not wish to disclose information about their personal circumstances. Whilst it seems they were keen to do all they could to foster productive relationships and encourage jobseekers to discuss personal issues that might impact on their job-search, some people were less keen than others to do so. Staff acknowledged the limitations of eliciting this information, especially if they were time-short; though it seems they did all they could to interpret non-verbal signs where possible.

*'If a customer is an alcoholic, unless he comes in absolutely reeking of drink at 9 o'clock in the morning, you're not necessarily going to know unless he tells you. Same with drugs. Mental health is another one that can be hidden if the customer doesn't want to tell us, but you do pick up things and you think he could have a mental health problem – and then it's about getting the customer's confidence, building that relationship to be able to have that honest conversation.'*

#### **JCP manager**

Several jobseekers mentioned the benefits of having one advisor with whom they could build a strong rapport. This was in comparison to past experiences of seeing more than one advisor, or being passed on to different advisors at various stages of a programme.

*'It does help if you see the same person, because they understand you and know what you talked about the previous week.'*

#### **JCP customer**

## Group vs individual induction

Jobseekers were particularly critical of being assessed in group induction sessions, which are a very common feature of Work Programme provider models. People felt that these sessions prevented them developing a good rapport with the advisor, or getting their views and opinions heard and documented. Several respondents reported that they were confused about the purpose of inductions and it was clear that the group setting made some customers feel that they would not be able to develop a strong relationship with a member of staff who would listen to them and their needs.

*'They set an appointment and then that group thing came through, but the advisor didn't ask us individually what we want to do; whether we're qualified; if we're looking for experience. Nothing. That was disappointing'*

**Work Programme customer**

*'My initial assessment was a group thing, which I don't think is the way to do it at all... it was a waste of everyone's time, a complete waste. It took two hours out of my day... It was a form filling exercise.'*

**Work Programme customer**

It is likely that these individuals subsequently had individual meetings with staff to discuss their plans in more detail, but it is clear that there could have been more clarity over the purpose of the induction meetings.

## Claimant Commitment

JCP staff reported that the new Claimant Commitment was proving to be beneficial in supporting the development of stronger and more constructive relationships between staff and advisors. Furthermore, it appeared that advisors were using new flexibilities to conduct assessments how they wanted to, tailoring the process depending on customers' needs. An example is 'skills screening' which advisors can choose to do either in an 'initial' or 'in-depth' manner. However, it was noted that Jobcentre reforms are still bedding down and it may take some time for them to operate entirely as intended.

*'The Claimant Commitment has really helped. People are buying into it and the onus is on the individual to guide the process. I think it will take time to bed down, the pace of change has been difficult, but we're getting there.'*

**JCP manager**

Work Programme staff also discussed the importance of being able to work with customers flexibly to develop strong and productive relationships. They highlighted that some customers need more in-depth and ongoing assessment than others, and that having good rapport with customers who have more complex needs can help by ensuring that the customer feels comfortable about discussing potentially sensitive issues. Developing Deep Value relationships is key to allowing this assessment to happen.

## Conclusions and Recommendations

Our research with customers receiving employment support from both Jobcentre Plus and the Work Programme shows that their experiences of assessment are often similar. Too often, customers feel that the staff they work with do not have adequate time, specialism, or resource to undertake successful assessment activities and to gain a full understanding of their individual barriers. In other words, people feel that advisors can often be limited in developing the Deep Value relationships which allow for support to be effective. Interestingly some staff felt the same.

It is clear that the very limited time and resources available in the current employment support system – in both Jobcentre Plus and in the Work Programme – are a significant limiting factor preventing quality assessment. Without additional resource in the system it will be hard for frontline advisors to implement the changes to processes, communications, staff behaviours and relationships – and fundamentally to working culture – which will be necessary to ensure that ongoing and participatory means of assessment can be actively pursued. Increased funding is required to ensure that caseloads can become more manageable – we believe for example that reducing average caseloads on the Work Programme significantly from around 150 to 50 would have a strong positive impact on job outcomes.

Notwithstanding the difficulties posed by an extremely tight financial climate for employment support services, this research has highlighted two key ways in which assessment of jobseekers could be improved to ensure effective support can be offered.

**Firstly, assessment should be an ongoing process.** To get an accurate, in-depth picture of a jobseeker's situation requires continually updating the assessment. Our research has shown that attempts to segment customers upfront into different 'streams' of support are unlikely to be successful, as successful assessment relies on a strong, trusting relationship to be built between advisor and jobseeker over time. It is more important for claimants that their advisors have the time and resources to build these relationships, use them to continually assess needs and abilities, and tailor support accordingly.

**Secondly, jobseeker assessment should involve the perspectives of jobseekers much more.** Jobseekers understand their own needs and abilities better than anyone. They should be put on a more equal footing with their advisors, allowing them to actively contribute to their assessment and thus shape their support offer. A more participatory assessment would also ensure employment support included a consideration of jobseekers' strengths and abilities, instead of just addressing their barriers and needs. Focusing on understanding what the customer can do and wants to do would encourage them to build on their strengths, and prevent their confidence from drastically decreasing as currently happens to too many jobseekers.

The following recommendations set out how DWP and contracted employment support providers could implement these changes. The recommendations are structured according to the four factors that have been discussed throughout the report; processes and tools, staff, relationships and communications.

## Processes

Our research showed that people appreciate it when employment advisors took time to get to know them – to develop a relationship which they continually used to assess their needs in an ongoing way. Assessment should be a continual process, gradually building an accurate picture of a jobseeker and continuing to inform decisions about the types of support they receive. Recent statements that DWP will move away from attempts at outright segmentation and towards trying to understand how well jobseekers respond to specific types of support represent shift towards this kind of ongoing assessment, and should be welcomed (House of Commons, 2014).

We also found that jobseekers tended to have strong understanding of their own needs and abilities – and therefore a more participatory assessment could build on these perspectives. The Claimant Commitment is a good opportunity for customers to self-assess and identify the correct sources of support; yet it could be improved by making it more meaningfully participatory and strength-focused.

**1. Assessments should be reviewed and updated on an ongoing basis**, so that claimants' changing circumstances are properly understood, and decisions about forms of support are made accordingly.

a) Guidance should make clear that the Claimant Commitment must be a live document which coaches and jobseekers can update when necessary, rather than only at infrequent reviews.

b) Information from a range of sources should be used to update assessments. In particular feedback from internal or external providers of specific support (such as workshops, training courses) should be fed through and properly documented so that it can be referenced and utilised by advisors.

**2. JCP and Work Programme providers should move towards a more collaborative, participatory form of assessment.** The Claimant Commitment offers a good example of this and its forthcoming evaluation should ask jobseekers the extent to which they feel they could influence their Commitments. Based on this evaluation, additional staff training and guidance should be put in place to ensure claimants are meaningfully inputting into their assessments.

**3. Assessment of jobseekers should take more of a strength-based approach.** This would involve focusing more on people's abilities, rather than just their barriers to work. Guidance should be developed to ensure the Claimant Commitment focuses on such strengths, and these should inform what types of support people are offered.

**4. At a basic level, tools and systems must be able to collect the range of situations and present these in an ongoing way.** JCP and WP providers should review their systems for collecting and recording customer information to ensure that information about barriers such as homelessness, childcare and transport are always collected and used to inform ongoing support.

## Partnerships

Improved communications between different providers of employment support and wrap-around services should allow assessments made to be updated even as jobseekers are passed between different sources of provision, and should avoid duplication of assessment, which can feel disempowering for jobseekers.

**5. Information about customers' strengths, abilities and barriers should be shared** between JCP and WP advisors, to smooth out assessment processes and avoid duplication. This includes sharing documents such as the Claimant Commitment, something recommended by the Oakley review of Jobseeker Sanctions (Oakley, 2014). In the long-term, this should also include data sharing agreements; in the immediate term, JCP advisors should ask customers for permission to send key information to WP providers upon referral.

**6. 'Warm handovers' should be implemented** between JCP and contracted employment provision, so as to minimise duplication of assessment. Aligned and improved Customer Management Systems, together with data sharing mechanisms, can help with this.

**7. 'Lead advisors'** (see point 9 below) **should ensure that staff at all levels can network and build a good working knowledge of available local provision to refer to.** Once customers have been referred to internal or contracted provision, advisors should stay in touch with the provider and use evaluative information to further improve assessment of the customer's strengths and needs.

## Staff

Frontline staff are key to ensuring assessment works, and they should be encouraged – through training and networking – to assess for jobseekers' strengths and needs in an ongoing way. While regulations allow for jobcentre coaches to use a degree of flexibility in their approach, our research found that staff could usefully be encouraged to make greater use of this. Encouraging fuller training about the discretion that coaches can apply should encourage more effective assessment to be used.

**8. JCP and WP providers should provide additional training to encourage staff to undertake ongoing assessment of customers' strengths and needs.**

a) JCP should receive further guidance about the discretion they can use in their approach with jobseekers, and the importance of proper and full assessment to enable such an approach to be taken.

b) Some of this training should focus on enabling staff to handle more sensitive and specialist issues that may arise through assessments. Advisors identified as supporting specialist needs through the JCP Social Justice agenda are welcomed, but they must be trained properly and competent at supporting other members of the team on these issues.

c) JCP and WP providers should ensure they facilitate uptake of such training and should utilise feedback from customers to identify staff who might benefit from training in assessment.

With jobcentres having more control over their staff structures, many have removed specialist advisors, and are instead looking to train all advisors to understand a wider range of barriers, including sensitive and complex issues. This has the potential to allow all staff to assess for the varied sets of barriers that jobseekers have. However, frontline staff told us there was a real risk of losing detailed knowledge of specific barriers – such as disabilities, homelessness or lone parenthood – and how to assess for them. Staff instead cited effective team working and 'lead advisors' as a way to improve understanding and efficiency – particularly through pooling different specialist knowledge.

**9. Jobcentres and Work Programme providers alike should appoint 'Lead Advisors' for specific areas** (such as disabilities, mental health, etc).

a) Other advisors should feel confident to ask for support from these individuals and given time to seek appropriate advice.

b) These lead advisors should be responsible for building partnerships at district level to allow for good understanding of different customer groups' needs, strengths and barriers, as well as local referral options and means of providing support.

## Relationships

The research found that Deep Value relationships between jobseekers and advisors are important. Previous work by Community Links has found that 'strong human relationships between public servants and clients can nourish confidence, trust and self-belief'. Data from this project shows clearly that this applies to employability assessment: strong human relationships can make it more likely for information to be shared and problems to be uncovered. Participatory approaches to assessment which involve jobseekers in an equal relationship with professionals and enable them to contribute their own perspectives can mean that assessment is more successful and ultimately their needs are better met. The research found that current systems of assessment are too frequently one-sided and disempowering, leaving jobseekers feeling uninvolved in the process.

Making sure jobseekers feel ownership over their assessment, and that they can build a strong, trusting relationship with a personal advisor is crucial. Adopting a participatory approach will by definition also ensure that customers are informed about assessments that have been made and their implications.

10. In order to allow for more empowering, participatory ways of doing assessment, **advisors and jobseekers should be encouraged to develop stronger, Deep Value relationships.** This should make jobseekers more likely to disclose strengths and barriers, and to improve overall assessment.

a) Changes which may enable the development of such Deep Value relationships should be trialled - including allowing jobseekers to choose which advisor supports them; or reducing advisors' responsibility for enforcing conditionality.

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# Deep Value Assessment

How ongoing, participatory employability assessments could improve outcomes for jobseekers

Every public service relies on effective assessment – to target resources, determine eligibility, and ensure people get the best service possible. Properly understanding jobseekers' needs and abilities is crucial to providing appropriate and effective employment support services and help people into long-term, sustainable jobs.

Community Links works every year with thousands of jobseekers through our employment and training service and our benefits advice service. We understand the importance of assessment in each of our services and use this to tailor the support that we provide. We also see the consequences of failure.

This report looks in-depth at how jobseekers' needs and abilities are assessed. We conducted interviews and focus groups with benefit claimants and staff at a range of jobcentres and Work Programme providers across east London. We have complemented this with a review of literature analysing assessment in other sectors.

Our research has generated two key principles underpinning a new approach to assessing employability and this report makes recommendations for improving assessment by employment support providers.

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