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Centre for Rural Policy Research

Community Council of Devon
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Proving our Value:

The Impact of Social Purpose Organisations on Training and Skills in the Okehampton Area

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February 2014

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Proving our Value

LOTTERY FUNDED

CRPR Research Report No. 37
ISBN 978-1-905892-18-1
February 2014
£10

This report can be downloaded free of charge from the CRPR website at:

http://www.centres.ex.ac.uk/crpr/publications

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Acknowledgements

We are grateful to the Social Purpose Organisations that took part in this research and are particularly grateful to the training participants who volunteered to take part in interviews. Devon County Council provided additional funding towards the costs of the research as did the University of Exeter.

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Executive Summary

As part of the Proving our Value project, run by South West Forum and funded by the Big Lottery Fund, the Centre for Rural Policy Research at the University of Exeter and the Community Council of Devon designed a research project to measure the impact of the provision of training by Social Purpose Organisations (SPOs) in the town of Okehampton. Okehampton is a market town on the northern fringes of Dartmoor where there had been over 300 redundancies caused by the closure of four food processing factories in one year.

Three SPOs were engaged in the research and 50 trainees were recruited to take part in two interviews – one at the beginning of their training, and one a few months later. A bespoke interactive questionnaire was designed to capture the impact of training using a Return on Investment in Skills training (RoIS) approach, which captures the direct financial impact of training. In addition, less tangible, non-monetised, social impacts were measured using an Index of Social Benefits (IoSB) based on five dimensions of well-being (general well-being; attitudes; social networks and relationships; trust and belonging; well-being and work). For both RoIS and IoSB the data was captured by the database underpinning the interactive Excel-based questionnaire tool.

Recruiting SPOs and individual trainees brought some challenges, since funding in the SPO sector is variable and uncertain, and people facing a difficult time in their life can be hard to engage and maintain contact with. However, once engaged organisations and individuals appreciated being involved in research designed to gauge the impact of the training provided or taken. Both SPOs and trainees received an incentive for taking part in the research.

Across the sample as a whole the RoIS was 916%. In other words for every £1 of cost incurred in the delivery and participation in training (by both the SPO and trainee), the benefit that accrued to the individual was £9.16. Presentation of the IoSB results is more complex but in many cases taking part in training was associated with positive changes in the five dimensions of the IoSB. That said the scale of both impacts varied considerably. This is for a range of reasons: the initial starting position of the individual trainee and subsequent developments in that position which are associated with training; the type of training – one-off, stand-alone events are less likely to produce an impact; and the costs faced by the training providers themselves. Our results suggest that impact is greatest for those who move from a position of unemployment to being either employed or self-employed (although this would also apply to an individual moving from a low paid position). For example, unemployed trainees in particular improved their scores for both well-being connected with work, training or business as well as general well-being. Those pursuing a self-employed route can be seen to benefit particularly from improvements to the 'attitude' measure (eg feeling better about themselves; feeling more optimistic about the future). In addition to the economic return from investment in training it is clear that there are a range of incidental impacts particularly relating to self-confidence, feelings about self and also social contacts. This research did not attempt to place a monetary value on these less tangible benefits but did identify a positive correlation between RoIS and IoSB.

The research has demonstrated that collaboration between the academic institution of the University of Exeter and the Third Sector organisation, Community Council of Devon, can produce a practical tool which is both usable with individuals benefitting from the services of an SPO, and can yield useful data on impact of that service across a number of parameters.

A number of recommendations flow from this research:

- In the Okehampton context and given limited resources in the first instance, training should be targeted at people who are unemployed and/or aiming to establish their own business. Elsewhere this recommendation would need to be considered within the context of local labour market characteristics.
- Longer term training is more effective than stand-alone training (although there is still a role for short, one-off training events). Therefore, resources should be targeted towards longer term training (albeit within the confines of the 16 hour rule)[1]. This would also benefit training providers who currently operate in an environment where short term and uncertain funding sources are typical.
- Due to the relatively small sample size in this research, it is recommended that the impact tool is used on a larger sample. This will aid further refinement and help clarify some of the training impacts reported here.
- The impact tool is designed to be relatively easy to use and analysis of data collected has been automated. Nevertheless some resource would be required to train potential users. This would not be expensive.

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[1] In December 2013 it was announced that the Department for Work and Pensions' (DWP) 16-hour rule, which limits the amount of time Job Seeker's Allowance (JSA) claimants can train every week, will no longer apply to government backed youth traineeships.

1. Introduction

1.1 Background and context

The town of Okehampton and the surrounding district located on the fringe of Dartmoor lie within an area sometimes known as '*the land between the moors*'. Agriculture and the food sector have remained economically, socially and culturally important in the area but the recent closures of major food businesses within the town have created some significant economic challenges, and have been associated with increased interventions around skills and employment. Social Purpose Organisations (SPOs) play an increasingly important role in the provision of skills and employment activities in the area. As the Okehampton and Area Market and Local Towns Initiative Community Action Plan "Looking Forward" (Okehampton MCTi 2005) points out, the communities of Okehampton and its hinterland showed great resilience in the face of the Foot and Mouth epidemic and the challenges facing agriculture, industry and commerce. The report goes on to state that that the predominance of agriculture in the local economy offers both challenges and opportunities for the sector. Similarly, it is recognised that there are challenges and opportunities for new and existing businesses such as the opportunities to further develop the area's visitor and tourism sector which is seen as being important for stimulating the local economy and the regeneration of Okehampton. The proximity of Okehampton and its hinterland to Dartmoor National Park and its wealth of historic and unspoilt buildings and unspoilt environment is a major asset. The town also has a Railway Station with the possibility of developing regular main-line access to Exeter. It has good road links to the A30, M5 and the motorway network. The Arts, recreation, sports and leisure are greatly valued and although provided for within the town, offer challenges for improvement in common with improvements to transport, retail and commercial activity.

It is fair to say that the challenges that faced Okehampton in 2005 continue to affect life there now. In 2011 and 2012 four food processing factories closed (Polestar, Robert Wiseman Dairies, Browns Chocolates and Kerry Group), making over 300 people redundant (although two subsequently re-opened albeit with a smaller workforce). Many of the people laid off had worked at the factories for many years. In a town of 8000 inhabitants this level of redundancies was clearly seen as a crisis situation. The local food bank went to the press to ask for more donations of food to meet increased demand. Over the same period there were limited new employment opportunities being created. Okehampton's relative isolation, referred to in the description above, posed problems for those seeking work. Okehampton Works Partnership, under the leadership of Devon County Council, was set up to respond to this high level of redundancies occurring within such a short period of time.

Against this background, the University of Exeter and the Community Council of Devon embarked on this research project to test the value of training interventions in the town which were being provided by a number of Social Purpose Organisations as well as statutory organisations.

1.2 Aims & Objectives

Against this background, the objectives of this research were:

1. To identify SPOs delivering social purpose activity designed to improve the skills and employment prospects of individuals in the Okehampton area of Devon, particularly in relation to agri-food, land and environmental sectors.
2. To identify and quantify the impact of such interventions on individuals that benefit from skills enhancement activities and training.
3. To identify and quantify the economic and wider socio-economic impact at the community level.

In doing this our aim was to also develop and test a robust methodology for demonstrating the socio-economic impact of SPOs.

The results of our review of SPOs providing training in agri-food, land and environmental sectors is included in Appendix 1. It should be noted that this is a snapshot of a particular moment in time (that was taken in the early stages of the research) and that subsequent changes in funding have impacted on the delivery landscape. As a consequence some of the organisations listed in Appendix 1 may no longer be operating or providing training.

1.3 Outline of Structure of report

The remainder of this report is structured as follows:

Section 2 reviews some of the literature on impact analysis and develops a bespoke methodological approach that has been tested in Okehampton and is capable of being replicated elsewhere.

Section 3 presents the results of the research drawing on quantitative and qualitative data to demonstrate the impact of training provided by SPOs in Okehampton.

Finally, Section 4 presents conclusions and recommendations.

2. Methodology

2.1 Introduction

In order to measure the socio-economic impacts of training provision by SPOs, a Return on Investments in Skills (RoIS) methodology was developed. RoIS gives a percentage return on any economic gains that might accrue over a specified period of time from investing in skills education or training. Given our interest in social as well as economic impacts, in addition an 'index of social benefits' (IoSB) was developed based on an extended basket of benefits that an individual may also accrue over the same period. For example, by learning new skills an individual may benefit from the content of learning, improve skills and competencies, gain access to social networks, boost self-esteem, develop better links to institutions, enhance potential mobility in the labour market, and increase quality of life. The methodology for RoIS and IoSB are discussed separately below.

2.2 Return on Investment in Skills (RoIS)

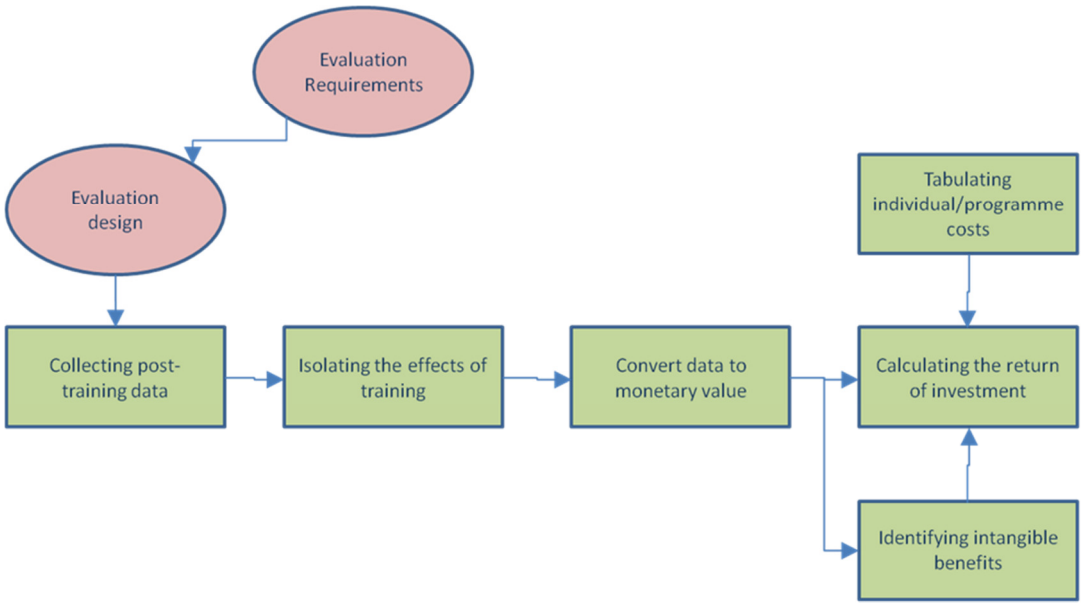
Within the training and development environment the Return on Investment (ROI) approach places a monetary value on the outcome of training programmes (Bartel, 2000; Phillips, 1996a, 1996b, 1996c; Phillips and Phillips, 2000, 2007; Spitzer, 2005). Training outcomes may be categorised into individual, organisational and ROI, which are summarised in Table 2.1. Given that one of the objectives of this research was to quantify the impact of purposeful activity designed to improve the skills and employment of individuals, the framework in Figure 2.1 was employed to assist the evaluation requirements.

Table 2.1 Categories of training outcomes

Outcomes	Details	Examples
Individual	Cognitive	Awareness of health and safety regulations or company policies and procedures
	Pychomotor	Ability to use a new piece of machinery or software
	Affective	Satisfaction, motivation
Organisational	Any measurable impact on measures of organisational performance	Quantity (e.g. sales) Quality (e.g. customer satisfaction) Business processes (e.g. machine downtime) Resources (e.g. wastage rates) Stakeholder perception (e.g. employee relations) HR (e.g. skills level of work force)
Return on Investment	Profits derived from training compared with costs	

Source: Adapted from Burbach (2009).

Figure 2.1 Framework for measuring return on Investment



Source: Phillips and Phillips (2000).

2.3 Evaluation design

A sound ROI analysis requires extensive data collection on numerous measures across multiple periods of time (Bartel, 2000). As such, revisiting participants was necessary to measure the extent to which new knowledge and skills learned during the training period had been transferred either into voluntary work, their quest for employment or, if already in employment, improvement in their current job. Ideally, trainees would have been interviewed on at least three occasions; before training commenced, after training and then after a further six months. In reality pre-training recruitment and interviewing of participants at three points in time was not possible. As a result two periods of measurement were taken. The practicalities of recruiting and interviewing trainees are discussed below in section 2.9.

Phillips and Phillips (2000) note that there are specific techniques for converting data collected on non-tangible benefits to monetary values when using ROI. These include the conversion of output to contribution, historical costs, data from external reports or databases, manager or staff estimates, for example. However, measures such as these are only appropriate for beneficiaries employed within an organisation. For beneficiaries that are external to an organisation the suggested measures are difficult to apply since much of the information required is not recorded and to do so would be costly in both time and money; and to implement them would require numerous theoretical assumptions. Nevertheless, there is one measure that Phillips and Phillips (2000) suggest, adopted in this research, which is to link ROI with other relevant measures. Therefore, in this current research ROI is linked to a measure of well-being (see section 2.8). Indeed, as the Commission on the Measurement of Economic Performance and Social Progress report, "direct non-monetary indicators may be preferable when monetary valuation is very uncertain or difficult to achieve" (Stiglitz et al., 2009). Thus, linking the ROI with a non-monetary

measure of the social benefits of training adds greater value, particularly given the difficulties and assumptions that would be necessary in their collection and conversion.

In order to calculate the ROI, it is necessary to attend to 'deadweight loss' that can bias the results. Deadweight loss refers to the costs associated with changes in performance or economic positions that would have occurred anyway without intervention. It is also necessary to assess how much of the outcome was caused by the contribution of other organisations or people outside the training programme. This is known as attribution. Measuring attribution requires avoiding double counting, particularly from the deadweight calculation. To identify any differences in values between the first and second interview, and whether this contributed to deadweight or attribution costs, a data collection spreadsheet was designed to clarify specific changes between the two recording periods. If changes occurred the respondents were asked whether the change in value was because of the specific training event, other training (attribution) or not connected to any training (deadweight).[2]

2.4 Calculating return on investment from training and skills (RoIS)

After accounting for deadweight and attribution costs, each individual's RoIS is calculated using the following formula:

$$\text{RoIS (\%)} = \frac{\text{Net value of benefits}}{\text{Value of inputs (costs)}} \times 100 \qquad \text{Equation 1}$$

where the 'net value of benefits' is the financial benefits gained by training less the individual's costs (e.g. transport costs, child care costs, equipment bought, etc.)[3]; and the 'value of inputs' is the cost of training injected by the SPO (i.e. the training programme costs).

As the RoIS is an innovative use of ROI to measure an individual's economic benefit from participation in skills training, it is necessary to present an interpretation of likely results. Thus,

If RoIS (%) ***is greater than one***, this represents an economic benefit to the individual and training provider;

If RoIS (%) ***is less than one but greater than zero***, this represents an economic benefit to the individual but a loss to the training provider;

If RoIS (%) ***is equal to zero***, this represents an economic loss to the training provider;

If RoIS (%) ***is less than zero***, this represents an economic loss to both the individual and the training provider.

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[2] Displacement costs and drop-off costs can also be measured but were not considered as central to the economic assessement of training. Displacement assesses how much of the outcome being studied is displaced by the other outcomes. Drop-off considers how long the impacts of the outcome are likely to last and this is influenced by other factors. Measuring drop off, however, only needs to be calculated for outcomes lasting more than one year. This would have required an additional interview one year after the specific training event had ended, which was outside the scope of this project.

[3] Calculating the RoIS at the organisational level compared to the individual's level has one important difference. At the organisational level, the organisational cost of training per individual - becomes part of the 'Net Value from Benefits'.

2.5 The measurement of social benefits

Much of the training offered to individuals by the SPOs participating in this research did not necessarily result in tangible accredited qualifications. However, it is recognised that participation in training can be associated with a range of wider benefits beyond the attainment of learning and the potential impact on employment status. As such, methods to measure less tangible social outcomes are necessary. Measures regarding changes in outcomes such as the impact on quality of life *can* be monetised in order to allow analysts to reduce complex information in to data that can easily be compared and valued. However, it may be difficult or misleading to summarise all impacts in one number (Lingane and Olsen, 2004). Therefore, instead of relying on monetised values for social benefits or any single measure such as improved self-esteem or greater satisfaction, we developed an index to measure social benefit. Anderson (2007) presents an overview of measurement tools that have been developed for or within the voluntary sector. The main tools include the 'Outcome Star', 'Spirit Level', 'Rickter Scale', and 'The SOUL Record'. The index of social benefits developed in this research was informed by both the SOUL (Soft Outcomes Universal Learning) and the New Economic Foundation's index of well-being (New Economics Foundation, 2009).

2.6 The SOUL Project

The SOUL Project grew out of a need identified by the Norfolk voluntary and community sector to evidence the progression of their clients in relation to so called 'soft' outcomes/informal learning (Anderson 2008). Its "client focused/learner centred approach focuses on solutions rather than problems. The system concentrates on what an individual can do, as opposed to the things they have been unable to achieve and it is intended as a positive experience for clients" (The SOUL Record 2006, cited in Anderson, 2008). During the development of the SOUL tool, its researchers mapped out 80 different 'soft' outcomes by working within six different types of community organisation. To access these outcomes, questionnaires and worksheets were devised from both adults and children. The adult questionnaire determined 21 positive statements, mapping on to three areas of outcomes: attitude, personal/interpersonal and practical outcomes (see Appendix 2). The first time that an individual completes the questionnaire provides a baseline numerical value whereas subsequent completions by clients illustrates the distance (and direction) of travel. We drew on this approach in designing our methodology and the list of outcomes mapped by the SOUL project (see Box 1) also influenced some of the wider outcomes we addressed.

Box 1 'soft' outcomes mapped by the SOUL project

Ability to carry out instructions	Engagement	Recognition of prior skills
Ability to complete forms	Evaluating	Reduced depression/anxiety
Ability to cope with constructive criticism	Feeling of responsibility	Relationships
Ability to cook	Feelings Form filling	Relationship with those in authority
Ability to follow written instructions	Health and fitness	Relevant conversation
Ability to meet deadlines	Initiative	Reliability
Ability to use tools and equipment	Inter-personal skills	Seek and/or respond to help and advice
Ability to write a CV	Job search	Self-awareness
Achievements	Knowledge	Self-esteem
Acquisition of language skills	Listening skills	Self-image
Adaptability	Motivation	Social belonging
Appearance	Non-verbal communication	Spiritual beliefs
Aspirations	Numeracy skills	Supporting others
Attendance	Oral communication	Taking part in meetings
Attitude	Organisational skills	Taking responsibility for own life
Awareness of rights and responsibilities	Personal circumstances	Team working
Behaviour	Personal hygiene	Time keeping
Belonging	Personal standards of conduct	Time management
Budgeting	Personal values	Telephone skills
Communication	Physical belonging	Understanding of emergency procedures
Community belonging	Planning	Understanding of equal opportunities issues
Completion of work placements	Positive regard for others	Understanding of others' roles in the workplace/project
Concentration	Presentation	Use of appropriate language for task or situation
Conduct	Prioritisation	Use of computer software
Self-confidence	Problem solving	Work output
Coordination	Questioning	Work quality
Decision making	Rate of sickness-related absence	Written communication
Encouraging others		

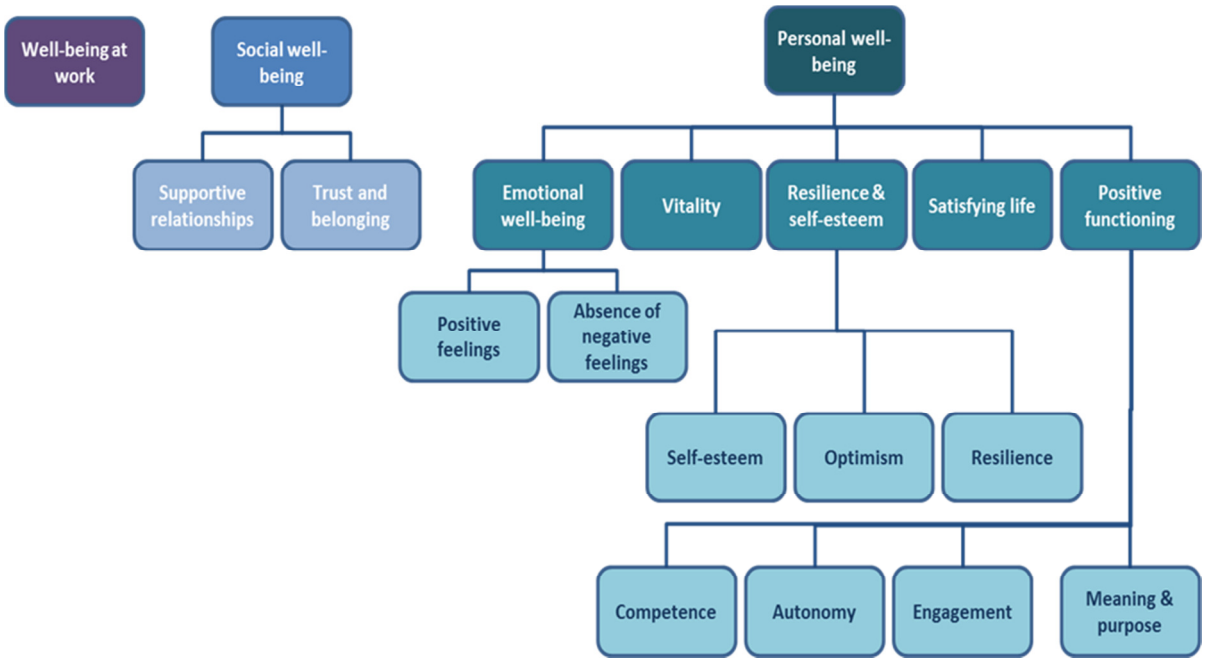
Source: The SOUL Record 2006

2.7 The New Economics Foundation Index

The other major influence on our approach to understanding social outcomes was the New Economics Foundation's (NEF) index of well-being which is based on a set of indicators. By measuring these indicators using Likert response scales people's feelings about themselves (positive feelings, absence of negative feelings, self-esteem, optimism, resilience, positive functioning, supportive relationships and trust and belong) formed the basis of the index (See Figure 2.2).

In turn, these categories formed axes of a spider diagram used for a visual representation. See Appendix 3 for the NEF questionnaire.

Figure 2.2: Indicator structure within the example national accounts framework



Source: New Economics Foundation (2009)

2.8 Index of social and skills benefits

The index of social benefits (IoSB) developed for this research integrates elements of both the NEF well-being index and the SOUL tool. Using a six point Likert scale, similar to the SOUL record approach, this allows a visual inspection of the data immediately after each interview. In total 36 questions were developed in order to explore five dimensions of well-being: general well-being; attitudes; social networks and relationships; trust and belonging; and well-being and work (see Appendix 5). The well-being and work section was tailored to the respondent's employment status (employed, self-employed or unemployed/not working).

As these questions for the IoSB were an integral part of the data collection tool, the tool flagged up changes between the two recording periods. If changes occurred, the respondents were asked whether the change in value was because of the specific training event, other training (attribution)

or not connected to any training (deadweight). After accounting for deadweight and attribution costs, the change in IoSB that resulted from training was calculated. In addition, the well-being indices of each section formed an axis on a radar graph. This enabled a visual comparison between the two interview periods.

2.9 From concept to reality: implementing the methodology in Okehampton

Given the objectives of the research and our methodological approach it was necessary to recruit two types of participant to engage with the research; SPOs providing suitable training and trainees themselves.

Recruitment of SPOs

Although we had identified a broad range of SPOs providing training in and around Okehampton during the initial phase of the research, actually recruiting suitable SPOs proved more challenging than anticipated for a number of reasons.

At the risk of stating the obvious, the SPOs needed to be providing training. Several potential SPO partners that provide training were not offering training at the time we needed to conduct field work, others ceased operation during the challenging time for funding that coincided with the period of the research. Indeed it was quickly apparent that training organisations were facing challenges, despite Okehampton being recognised as having particular support needs at the time. Funding for their activities was short term and uncertain – a situation which exists to the present time. One organisation was conducting training in Okehampton, but following withdrawal of local funding this provision was transferred to Exeter and Barnstaple. Trainees then had a choice of travelling to different training provision or giving up mid-course. This has meant that at various times throughout the research period training organisations have been hard to contact or involve in the research. It also took a long time from initially gaining the interest of an SPO to 'selling' them the benefits of participation, assuring them of confidentiality and finally gaining written agreement.

Eventually three SPOs were recruited to take part in the research:

BiP (Business Information Point)

BIP describe themselves as an enterprise agency and have been providing advice and training since 1993. Their expertise is founded upon practical business experience in the small business sector. Their aim is to help businesses with their development and sustainability by improving their competitiveness, leading to increased profitability and employment. BIP consists of seven staff and a number of volunteers delivering a mentoring programme. In the 12 months prior to their involvement in the research BIP provided training for 90 people (mainly aged 25 plus). The training provided all relate to business skills including vocational training/finance/marketing/IT and one-to-one on business diversification.

Westward Pathfinder (now Ockment Job Club)

The Ockment Centre provides and maintains a community centre for the inhabitants of the parishes of Okehampton and surrounding area, for meetings, lectures and classes and for other forms of

recreation and leisure time. For several years the centre has offered a range of open distance learning in a variety of subjects. This service is now under the management of the Pathfinder Trust.

Pathfinder aims to assist individuals and communities within Devon to participate in their own economic and social development through the use of new Information and Communication Technologies (ICT). Westward Pathfinder is responsible for the development and management of Pathfinder Learning Centres which now includes the Pathfinder Centre based in the Ockment Centre. Types of learning/training provided include:

- European Computer Driving Licence.
- National tests in Numeracy & Literacy Level 1 and 2
- NVQs in Customer Service and Business Administration

Additional training covers:

Project Management - Setting Up Your Own Business - Marketing, Unleashing the Potential of Your Business - Essential Business Skills—DDA Awareness—Health & Safety—Communication Skills - Decision Making - Problem Solving - Time Management.

Rochdale Connections Trust (RCT)

This community based charity was started in 1988. RCT aims to connect young people with adults who can help them return to education and training but, even more importantly, perhaps to raise their individual self-worth and self-confidence which will lead to inclusion rather than exclusion. RCT Training is a commercially operating training company based in the North West, and it is itself owned 100% by a charity – Rochdale Connections Trust (which is where the training company's name RCT comes from). RCT operates commercially (it is established as a company limited by guarantee) however, since all its profits are formally and legally covenanted into the charity, it is a 'social enterprise' and considered to be 'not for profit'. The training RCT offered in Okehamption included a workshop on team skills and another on 'start your own business'.

Each of the SPOs was recruited on the basis that they would receive a modest incentive to recognise the time staff were giving up in providing some basic information and helping the project recruit trainees. The SPOs were also offered the chance to take part in a feedback session which was held at the University of Exeter once the initial results could be presented.

Contact was made with the senior member of staff in each case. There were some existing relationships with the two locally based SPOs, one of which provided a link to RCT. There was real interest in the research project at this level, although we also needed to make contact with staff actually delivering the training, who were then very helpful. Nevertheless, the pressures of maintaining an SPO in a challenging funding situation was, understandably, always going to be a priority for staff.

Recruitment of participants

Having recruited three SPOs the next stage was to recruit trainees. Again, this was more challenging than initially anticipated. We found that training provision was not based on long term set courses but on modules of training or short free-standing training days. As the research progressed one major block of training was organised as a drop-in Jobs Club, or tutor supported IT training modules. This more informal structure had an impact on the way we were able to access trainees. For instance, for one course we knew that approximately 40 trainees had registered to take part in sessions, but in the event only about half (or fewer on occasions) actually turned up to any given session. Since personal contact was by far the most effective way to recruit trainees to the programme this was a very real challenge to the research. We quickly found that people attending the Job Club or basic IT training sessions would often not answer phone calls, even at pre-arranged times. They were mistrustful of who might be phoning them, and for what reason. On the other hand, the cohort of trainees who were aiming to start their own business started to be too busy to prioritise unknown phone calls. Others initially agreed to take part but subsequently their personal lives disintegrated still further. For instance, one person had a clear mental breakdown. It has to be said though, that when barriers to communication had been overcome and the research had been explained, most trainees were happy to take part and we have had feedback that they valued the chance to talk about their circumstances.

At the recruitment stage trainees were provided with an information sheet and project summary alongside a verbal explanation of the research. Also information on the trainees' reasons for attending training events; the sector of the economy they have worked in; and socio-economic data on age, gender and education was collected. As an incentive to participate in the research, the trainees were offered a voucher for £30, which would be payable on the completion of the two telephone interviews (see below). The £30 voucher was a useful mechanism to encourage trainees to engage and often, given their circumstances, was a much valued reward for engaging. A total of 64 individuals agreed to take part in the research of which 50 were successfully interviewed on two occasions.

Respondents that had agreed to take part in the research were interviewed at the beginning or as near to the beginning of the training as possible, with the second interview taking place a few months later. Ideally, the two interviews should have taken place at the beginning and end of the training. However, in practice this was not possible because training sessions varied considerably in length from single, stand-alone courses to training sessions spread over the course of an academic year. In the first interview respondents were asked about the costs of training; their personal costs of travelling to the training venue; whether they need to pay for childcare or other extra costs; the value of their income and any social security benefits. In the second, identical questions about their costs and income were asked.

Finally, towards the end of the research a meeting was held with representatives of two of the training organisations and a trainee in order to discuss the initial results coming out of the research and comment on the possible benefits of measuring the impact of their service delivery. This was an opportunity to gauge the level of interest there might be among SPOs in using a RoIS and IoSB as methods of measuring impact.

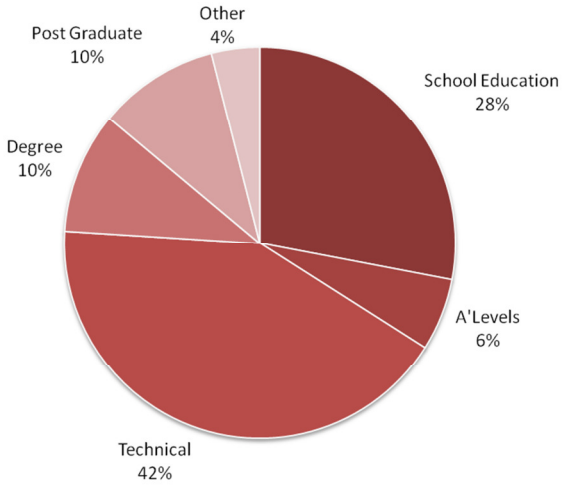
The research was conducted with approval of the Ethics Committee of the College of Social Sciences and International Studies, University of Exeter. This ensures that all participants are provided with sufficient information to enable them to give informed consent; that they understand their right to withdraw from the process at any time and that their data will be stored securely and anonymously in accordance with the data protection act.

3. Results

3.1 Overview of the trainees

Of the 50 trainees, 50% were male and 44% were female, while 6% preferred not to say. The average age of the trainees was 42. Although this ranged from 20 to 63 years old, a median age of 40 suggests an even distribution. Most (42%) were formally educated to a technical level, while 28% had only attained a school level education (See Figure 3.1).

Figure 3.1 Formal education level of trainees



Initially, in terms of employment status, 52% of trainees were unemployed (see Table 3.1). Many had been unemployed for a number of years (see Figure 3.2) although 10 had been unemployed for one year or less. Twenty trainees indicated that they were actively looking for work, reporting that they were "*getting back into work*", "*finding a job*" or "*to look for work and get help and support*". A further 12 people were seeking self-employment or were in the process of starting their own business as this trainee stated:

> *"Starting up a business [therefore training] to learn any new techniques/skills required to fulfil this venture".*

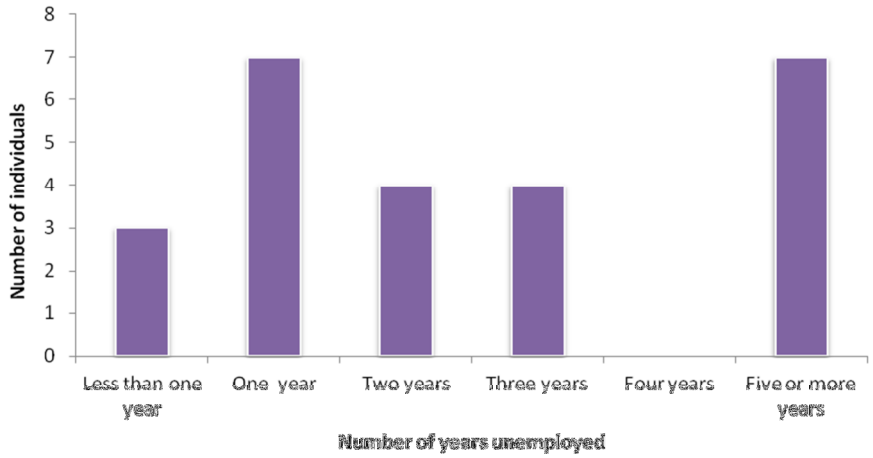
For another trainee, the route to self-employment was perceived to be more imposed upon them:

> *"I am unable to find work and my only option is to try self-employment, and I want to know if my knowledge can be expanded by attending."*

Table 3.1 A comparison of employment status between interviews

Employment status	Status at interview 1		Status at interview 2		Change between interviews
	Number	%	Number	%	% change
Unemployed	26	52%	19	38%	-14%
Employed	8	16%	18	36%	20%
Self-Employed	16	32%	13	26%	-6%

Figure 3.2 Length of unemployment



For some, training was not only about the goal of successfully returning to work or self-employment but also the journey to this goal. For example, one trainee commented on wishing to improve his self confidence and self-esteem. For others, self-improvement focused on the desire to gain confidence in a specific skill, such as computers or business development. A further group sought either access to knowledge or support to improve their business venture, as these trainees comment:

"needed recruitment support. External input needed"

and

"access to local knowledge and farm diversification support".

3.2 Training

The type of courses undertaken by the trainees varied considerably, from certified/accredited courses to generic employment skills. Training included ECDL (The European Computer Driving Licence) to improve the use of information technology (IT) and mathematics and English courses to

improve numeracy and literacy skills. Other courses include those focusing on specific aspects of job searching, such as developing a curriculum vitae (CV) and online job search skills. Other specific training included covering the core skills required in starting or developing a business.

The sample was more or less split between those that had already taken part in training (44%) and those who had done no training over the previous twelve months (46%). The majority of those with a history of training thought that they would continue some form of training in the following twelve months.

Of the trainees, 62% attended events that were part of a longer series. A series could be as short as two weeks, whereas some trainees were committed to a two year programme of training. The average length of a series was 15 weeks. Approximately, one-third of trainees attended events that were specifically targeted as standalone sessions.

The reasons for the participants embarking on training varied from a desire to acquire new knowledge and skills to recognition of how training could improve self confidence and self-esteem both generally but also related to a specific skill. For example, one trainee who was attending a Maths course commented that the reason for doing it was not only to better her skills in this subject but also to improve her self confidence and self-esteem. Many of the trainees recognised their personal challenges. One trainee on an English course was aware of the need for accurate spelling when completing application forms in the hope that this would enable her "*to help get on in life*". Other trainees were possibly less aware of their needs. One, for instance, was attending a maths course because her tutor had asked her to, although she did acknowledge that it would provide useful future information. Similarly, another on a course connected with starting a business reported that the Job Centre had offered it to him and that he was open minded about the option.

3.3 Employment impacts

By the time of the second interview, approximately six months later, eight fewer trainees were unemployed, reducing unemployed trainees to 38% of the sample. However, this hides the dynamics of change and particularly the movement from under-employment to full employment. In total, nearly one-third of trainees changed their employment status between interviews (see Table 3.2). For example, four trainees moved from unemployment into full-time work while a further two moved from unemployment into full-time self-employment. While there was a general shift from unemployment to employment/self-employment, this tended to occur among those experiencing shorter periods of unemployment. For example, only three out of eight trainees who had previously been unemployed for two years or more had secured jobs by the time of the second interview.

Table 3.2 Direction of change in employment status between first and second interviews

Change in work status	Number
Unemployed to full-time work	4
Unemployed to part-time work	2
Unemployed to full-time self-employed	1
Casual employment to part-time employment	1
Part-time self-employment to full-time employment	2
Part-time self-employment to full-time self-employment	3
Full-time self-employment to full-time employment	2
Part-time employment to unemployed	1

At the time of the first interview, a majority of trainees indicated that they had either previously been employed in, or were still working in, land-based industries and allied sectors (e.g. agriculture, forestry and food processing). In total 30 trainees stated that they were currently working in land-based industries. Of these, 14 were employed and 16 were working on a self-employed basis. Work in agriculture (26%) and the food industry (42%) accounted for many of these trainees (see Figure 3.3). However, by the second interview this had changed. Figure 3.4 illustrates the relative change of those working in different land-based sectors. It is not surprising that the food sector showed the greatest decline (16%) given the contraction of this sector in Okehampton during recent years.

Figure 3.3 **Land-based sectors trainees previously or currently worked in (at time of Interview 1)**

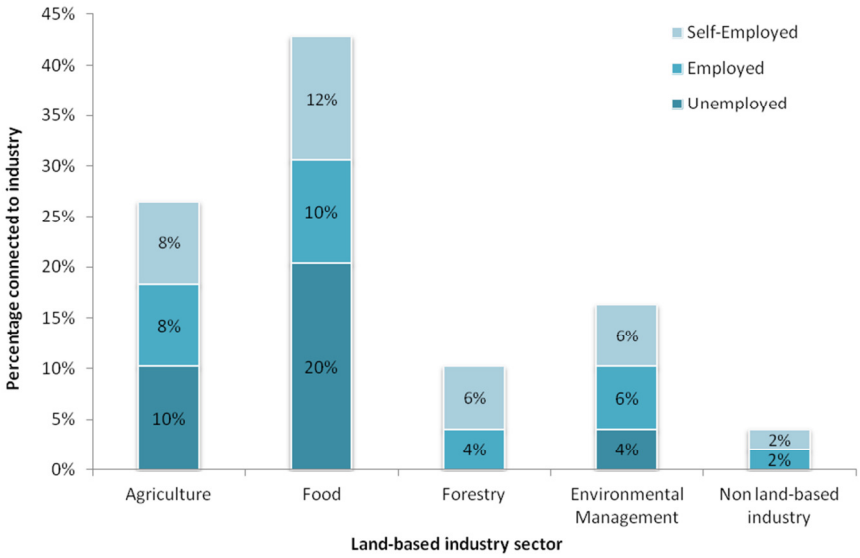


Figure 3.4 **Relative changes in land-based sector between first and second interview**

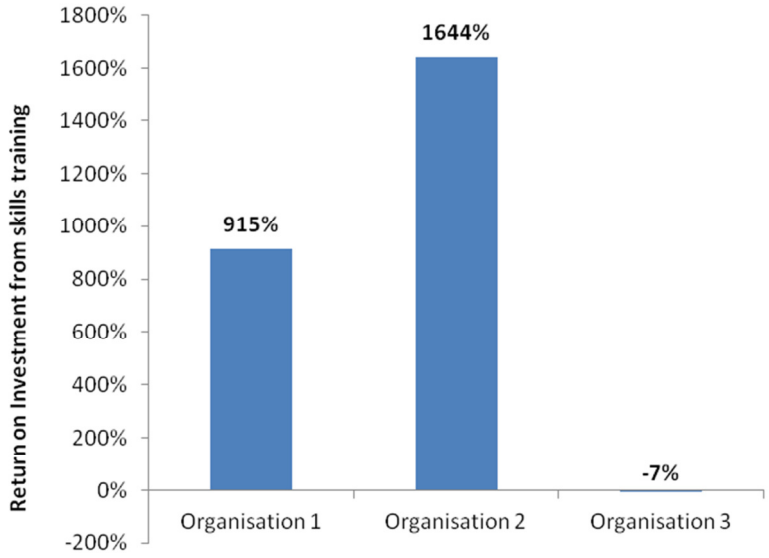
3.4 Return on Investment in skills training

As the previous sections indicate, trainees foresaw a range of potential benefits, some of which were more tangible than others, as a result of participating in a wide range of different types of training activity. In order to calculate the RoIS detailed financial data was collected from the training providers as well as detailed information from the trainees themselves. In total the cost of providing training by the SPOs was estimated to be £535,149 while the trainees incurred an additional £5,825 in accessing the training (i.e. costs associated with travel, arranging child care etc). At an aggregate level for individuals (i.e. across the three SPOs delivering training) the RoIS

was 916%.[4] In other words, for every £1 of cost incurred by the individual and organisation in the delivery of (and participating in) training, the benefit that accrued in terms of the individual was £9.16. However, this masks wide differences in RoIS for individuals both between each of the three SPOs and also considerable variability within the cohort of trainees associated with any individual SPO (see Table 3.3 opposite).

Figure 3.5 illustrates the RoIS for individuals associated with each SPO. Clearly, there is a wide variation between the SPOs and some caution must be exercised in interpreting these figures. For instance, an organisation that delivers a considerable amount of training may only incur marginal additional costs in putting on a specific additional course. Therefore, if the costs of delivering training are lower, for any given benefit the rate of return will be higher. Similarly, an organisation developing training for the first time may face significant start-up costs which would impact on the individual's RoIS. Equally, an individual taking a low cost course and then moving in to well-paid employment would skew the results.

Figure 3.5 Return on Investment in Skills Training to individuals by SPO



[4] Equation 1 in Section 2.4 calculates the RoIS (%) and is given as the net benefits to the individual ($b_t - c_t$) divided by the costs per individual to the organisation delivering the training (c_i). Thus, ($b_t - c_t$) / $c_i \times 100$. For example, trainee T1007 received personal benefits of £1184 (b_t) which were directly attributable to the training they participated in , while the personal costs of this training was £656 (c_t), and the institutional cost was £241 (c_i). Therefore, the RoIS for T1007 (£1184 - £656)/£241 × 100 = 291%. For all individuals surveyed this resulted in an average RoIS of 916%.

Table 3.3 Individual RoIS values directly attributable to training

Individual	Personal costs/benefits: Benefit from training (b_t)	Cost of training (c_t)	Institutional costs: Per person training cost) (c_i)	RoIS % ($(b_t - c_t) / c_i \times 100$)	Economic Impact of training*
T1001	£0	£329	£241	-136%	4
T1004	£80	£144	£241	-27%	4
T1005	£24	£0	£241	10%	2
T1006	-£1,600	£18	£241	-671%	4
T1007	£1,184	£656	£241	219%	1
T1008	£0	£101	£241	-42%	4
T1009	£1,000	-£36	£241	430%	1
T1012	£2,480	£130	£241	975%	1
T1013	-£2,858	-£20	£241	-1178%	4
T1014	£0	£0	£241	0%	3
T1015	£4,500	£108	£241	1822%	1
T1016	£0	£162	£241	-67%	4
T1017	£3,600	£84	£241	1459%	1
T1018	£0	£0	£241	0%	3
T1020	£26,000	£3,456	£241	9354%	1
T1022	£6,000	£0	£241	2490%	1
T2001	£0	£0	£35	0%	3
T2002	£0	£316	£35	-903%	4
T2003	£0	£0	£35	0%	3
T2004	£0	£0	£35	0%	3
T2005	£0	£4	£35	-11%	4
T2006	£480	£0	£35	1371%	1
T2007	£0	£0	£35	0%	3
T2008	£0	£259	£35	-741%	4
T2009	£0	£0	£35	0%	3
T2010	£0	£0	£35	0%	3
T2011	£0	£2	£35	-4%	4
T2012	£9,088	£13	£35	25930%	1
T2014	£0	£11	£35	-30%	4
T2016	£0	£22	£35	-62%	4
T2017	£0	£0	£35	0%	3
T2020	£2,000	£9	£35	5689%	1
T2021	£0	£0	£35	0%	3
T2023	£0	£0	£35	0%	3
T2024	£0	£0	£35	0%	3
T3001	£0	£0	£450	0%	3
T3002	£0	£0	£450	0%	3
T3003	£0	£31	£450	-7%	4
T3004	£0	£9	£450	-2%	4
T3005	-£400	£0	£450	-89%	4
T3006	£0	£0	£450	0%	3

T3008	£0	£0	£450	0%	3
T3009	£0	£1	£450	0%	4
T3010	£0	£0	£450	0%	3
T3011	£0	£0	£450	0%	3
T3012	£0	£0	£450	0%	3
T3014	£0	£0	£450	0%	3
T3015	£0	£5	£450	-1%	4
T3016	£0	£13	£450	-3%	4
T3017	£0	£0	£450	0%	3

** Impact of training on the individual and training organisation where 1 represents an economic benefit to the individual and training provider; 2 represents an economic benefit to the individual but a loss to the training provider; 3 represents an economic loss to the training provider; and 4 represents an economic loss to both the individual and the training provider.*

Figure 3.6 indicates the range of values for RoIS for each SPO. Unfortunately it is not possible for us to explain the RoIS values associated with SPO 3 without breaching confidentiality protocols. As subsequent analysis will indicate SPOs 1 and 2 were dealing with different groups of people with different characteristics and this may go some way to explaining the difference between their respective RoIS values. Finally, Figure 3.7 indicates the RoIS according to employment status at the time of the initial interview. It can be seen that the return on investment for people already in employment was the lowest (and that it has a narrow range). On the other hand, the return for those who were either self-employed or unemployed is above the sample average of 916%. The result for those in self-employment in particular, was skewed by a few individuals with significant returns to training.

Nevertheless, the results suggest that targeting training at people not in employment or possibly in low wage employment is likely (all other things being equal) to deliver a greater economic return. Indeed, despite the variation in results across the sample the results for some individuals show a clear financial return on investment in the provision of skills training. Two of the SPOs we have been working with have already shown considerable interest in these results.

Figure 3.6 Maximum, minimum and average range of individual's RoIS for each SPO

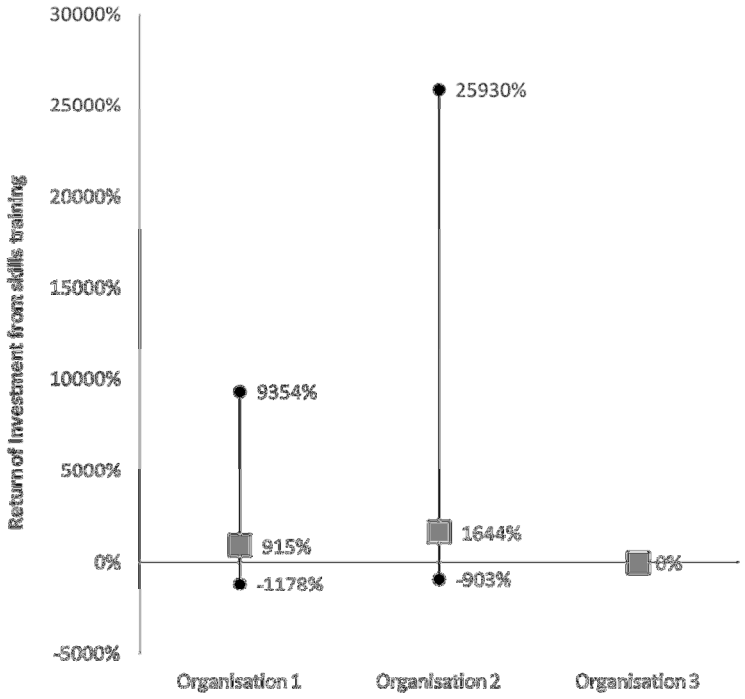
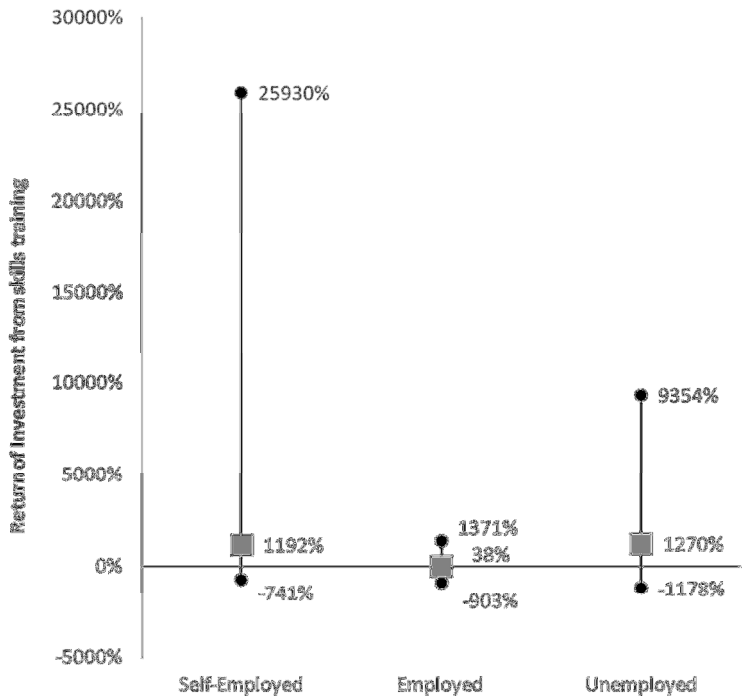


Figure 3.7 Maximum, minimum and average range of individual's RoIS by employment status at the time of Interview 1



It is also possible to consider the RoIS at the organisational level.[5] For this, the costs incurred by the SPO in delivering training are included in the calculation of net benefits. If an individual's income has not decreased or they have not incurred a personal cost in undertaking training, the maximum loss of providing training to an organisation is 100%. That is, the cost of training provided by the SPO provides no benefits for the individual trained. Table 3.4 shows the organisational RoIS for each of the three SPOs. Organisation 2 provided the greatest RoIS at the organisational level. Thus for very pound that this organisation spent on training the economic impact was £15.44. However, for Organisation 3, the cost of training not only represented a loss to the organisation but also personal cost to the individuals it trained.

Table 3.4 Organisational Return on Investment in Skills Training

Return on Investment	Organisation 1	Organisation 2	Organisation 3
Organisational RoIS	823%	1544%	-107%

3.5 The Index of Social Benefits (IoSB) from skills training

In addition to calculating the RoIS, the research team set out to test a new method of measuring social benefits, as outlined in Section 2.8. As with RoIS, in order to calculate the IoSB from skills training, it is necessary to delimit the proportion of change that has occurred as a result of the training that trainees were participating in. Change is excluded from the IoSB analysis where this is estimated to be a result of other training not connected with the training which trainees were enrolled in, or changes in other aspects of the trainee's life. Given that we are interested in the impact over time resulting from the training provided by SPOs, in the presentation of the results we have calculated the percentage change in various indices of social benefit. Clearly these changes are only estimates but they do show a clear direction of travel.

For some of the trainees their training experience resulted in tangible outcomes (such as a qualification or access to a grant). Others pointed to social and personal benefits such as making friends, improving self-confidence and networking, as the following quotes illustrate:

> *"I have got some new qualifications, made some friends and hopefully will get a job soon!" (Unemployed trainee).*
>
> *"The [SPO] trainers were the first people to reflect positively on my business idea and give me confidence to take it forward" (Unemployed trainee).*
>
> *"… Really helpful on the confidence side, especially setting up a new business with no idea …" (Business traineee)*

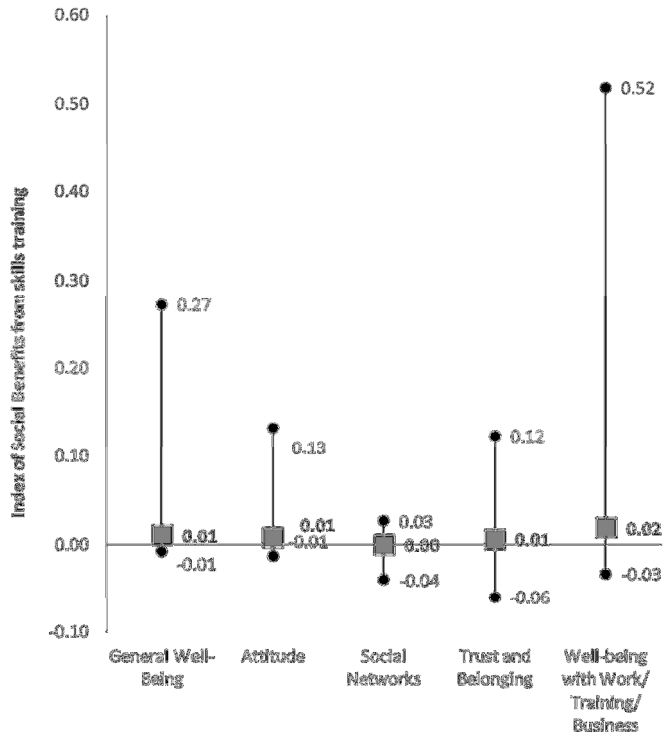
[5] RoIS at the organisational level is calculated by accounting for the cost to the organisation of delivering training (c_i) in the net benefits. Thus, $(b_t - c_t - c_i) / c_i \times 100$.

"Had difficulties getting a job and am now working independently on web development. Opportunity arose out of an enterprise networking event". (Business trainee)

"Have taken up voluntary work with a children's charitable business, I met through the training network" (business trainee)

The purpose of the IoSB is to capture some of the less tangible benefits (such as gaining in self-confidence and making friends), to quantify them (in a non-monetary manner) and express them visually. Figure 3.8 and Table 3.5 illustrate the maximum, minimum and average change to the five dimensions (general well-being, attitude, social networks, trust and belonging, and well-being at 'work') that contribute to an individual's ISoB. The first observation from this figure is that not all changes to an individual's well-being were necessarily positive, with some individuals recording negative changes as a result of skills training. For instance, a move from un/underemployment to full time employment may be associated with less time available to spend with friends and family. However, where positive changes to well-being were recorded they tended to be much greater than negative changes.

Figure 3.8 Maximum, minimum and average change of the five dimensions for individuals' ISoBs[6]



[6] Figure 3.9 shows the average, maximum and minimum ranges of the five dimensions of ISoB for the individuals in the survey. The average is represented by the grey square, the maximum and minimum well-being measure in the ISoB are indicated by the black dots at the ends of the bar line, respectively, above and below the average value.

Table 3.5 (1 of 2) Individuals' change in ISoB indicator values from training

Individual	Change in ISoB indicators					% Change as a result of training					Indicator change as a result of training				
	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business
T1001	0.20	0.02	0.07	0.04	0.03	17%	0%	0%	0%	0%	0.03	0.00	0.00	0.00	0.00
T1004	-0.08	-0.13	0.00	0.16	0.07	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T1005	0.06	0.02	-0.13	0.16	-0.10	20%	20%	30%	0%	0%	0.01	0.00	-0.04	0.00	0.00
T1006	0.04	0.11	0.07	0.08	0.03	0%	30%	0%	0%	0%	0.00	0.03	0.00	0.00	0.00
T1007	-0.06	-0.07	-0.03	0.00	0.43	13%	20%	20%	0%	15%	-0.01	-0.01	-0.01	0.00	0.07
T1008	-0.02	0.00	0.00	0.00	-0.03	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T1009	0.04	-0.07	0.08	0.00	0.07	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T1012	0.44	0.18	-0.10	0.04	0.10	18%	25%	0%	0%	25%	0.08	0.04	0.00	0.00	0.03
T1013	-0.08	-0.02	0.07	-0.08	-0.03	0%	0%	0%	20%	0%	0.00	0.00	0.00	-0.02	0.00
T1014	-0.02	0.02	0.00	-0.08	-0.10	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T1015	0.02	0.11	-0.10	-0.08	-0.03	35%	30%	0%	0%	0%	0.01	0.03	0.00	0.00	0.00
T1016	-0.02	-0.04	-0.03	-0.20	0.07	0%	0%	20%	0%	0%	0.00	0.00	-0.01	0.00	0.00
T1017	0.02	-0.02	0.03	-0.04	-0.03	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00

T1018	-0.06	0.00	-0.03	-0.04	0.00		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T1020	-0.02	-0.02	0.17	-0.08	-0.05		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T1022	-0.02	-0.04	0.00	-0.12	0.07		0%	30%	0%	20%	0%		0.00	-0.01	0.00	-0.02	0.00
T2001	0.06	-0.18	-0.07	0.16	0.13		38%	0%	0%	50%	44%		0.02	0.00	0.00	0.08	0.06
T2002	-0.06	0.07	0.03	0.12	-0.03		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T2003	0.04	-0.09	0.07	0.00	-0.03		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T2004	0.36	0.16	-0.13	0.16	-0.03		14%	20%	0%	20%	0%		0.05	0.03	0.00	0.03	0.00
T2005	0.20	0.18	0.00	0.16	0.07		10%	40%	0%	40%	10%		0.02	0.07	0.00	0.06	0.01
T2006	0.06	0.29	0.03	0.00	0.07		0%	20%	0%	0%	0%		0.00	0.06	0.00	0.00	0.00
T2007	-0.04	0.00	-0.03	0.00	-0.03		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T2008	-0.04	0.04	0.10	0.20	-0.13		0%	0%	0%	20%	0%		0.00	0.00	0.00	0.04	0.00
T2009	0.38	-0.02	-0.03	-0.04	0.13		0%	5%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00

Table 3.5 (2 of 2) Individuals' change in ISoB indicator values from training

Individual	Change in ISoB indicators					% Change as a result of training					Indicator change as a result of training				
	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business
T2010	-0.16	-0.33	-0.13	0.00	0.00	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T2011	0.00	0.02	0.00	0.00	-0.03	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T2012	0.04	0.16	0.00	-0.12	0.70	60%	85%	0%	50%	74%	0.02	0.13	0.00	-0.06	0.52
T2014	-0.14	-0.13	-0.20	-0.24	-0.17	0%	0%	0%	0%	20%	0.00	0.00	0.00	0.00	-0.03
T2016	0.14	0.07	0.07	0.16	0.27	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T2017	-0.08	-0.07	-0.03	0.04	0.00	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T2020	0.12	0.07	0.00	-0.04	0.37	0%	20%	0%	0%	35%	0.00	0.01	0.00	0.00	0.13
T2021	-0.02	-0.02	0.03	-0.08	-0.17	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T2023	0.34	0.09	0.20	0.56	0.10	80%	16%	13%	22%	0%	0.27	0.01	0.03	0.12	0.00
T2024	-0.14	0.18	0.03	0.08	0.03	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T3001	-0.02	0.11	0.00	0.04	0.00	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T3002	0.20	-0.02	-0.23	-0.32	0.23	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00
T3003	-0.22	-0.13	-0.13	-0.08	-0.10	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00

T3004	0.06	0.09	-0.07	0.00	0.20		0%	0%	0%	0%	50%		0.00	0.00	0.00	0.00	0.10
T3005	-0.06	0.00	-0.03	0.28	-0.03		0%	0%	0%	18%	0%		0.00	0.00	0.00	0.05	0.00
T3006	0.08	0.16	0.13	0.12	0.00		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3008	0.00	-0.11	-0.03	l’s le-0.13	-0.13		10%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3009	0.16	0.09	0.07	0.04	0.07		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3010	-0.22	-0.20	-0.23	-0.04	0.30		0%	3%	0%	0%	18%		0.00	-0.01	0.00	0.00	0.05
T3011	-0.16	-0.16	-0.13	0.28	0.23		5%	0%	0%	0%	0%		-0.01	0.00	0.00	0.00	0.00
T3012	-0.34	-0.02	-0.33	0.04	-0.23		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3014	0.16	0.09	0.07	0.04	0.03		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3015	-0.32	-0.18	-0.03	0.04	0.23		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3016	0.10	0.02	0.00	0.04	0.03		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00
T3017	0.04	-0.04	0.00	0.00	-0.03		0%	0%	0%	0%	0%		0.00	0.00	0.00	0.00	0.00

Figure 3.9 and Table 3.6 display the changes in IoSB that are directly attributable to participating in skills training from the three SPOs. They also illustrate the aggregate change across all beneficiaries of the training. From this it is clear that SPO 2 had the greatest impact on individual well-being. Compared to the aggregate impact, SPO 2 had a greater positive impact on four of the five elements of the index. The exception was that of social networks (and relationships) for which SPO 1 had the greatest impact. This may be a reflection of the constraints on time for social activity experienced by individuals starting up their own businesses – a characteristic of those research participants receiving training from SPO 2. On the other hand, a *prima facie* inspection of Figure 3.9 would suggest that SPO 3 had very little impact. Indeed, it had no impact on the general well-being, attitude and social network elements of the IoSB. However, it should be recognised that this organisation, unlike SPO 1 and 2, provided standalone events. Thus, there is limited scope in these very targeted, time limited events for having any major social impact on other aspects of a trainees life. Indeed, where SPO 3 did achieve, particularly compared to SPO 1, was to improve well-being connected to work, training and business. To this end, it was to a certain extent achieving its objective.

Figure 3.9 **Percentage change in the Index of Social Benefits as a direct result of skills training from different organisations**

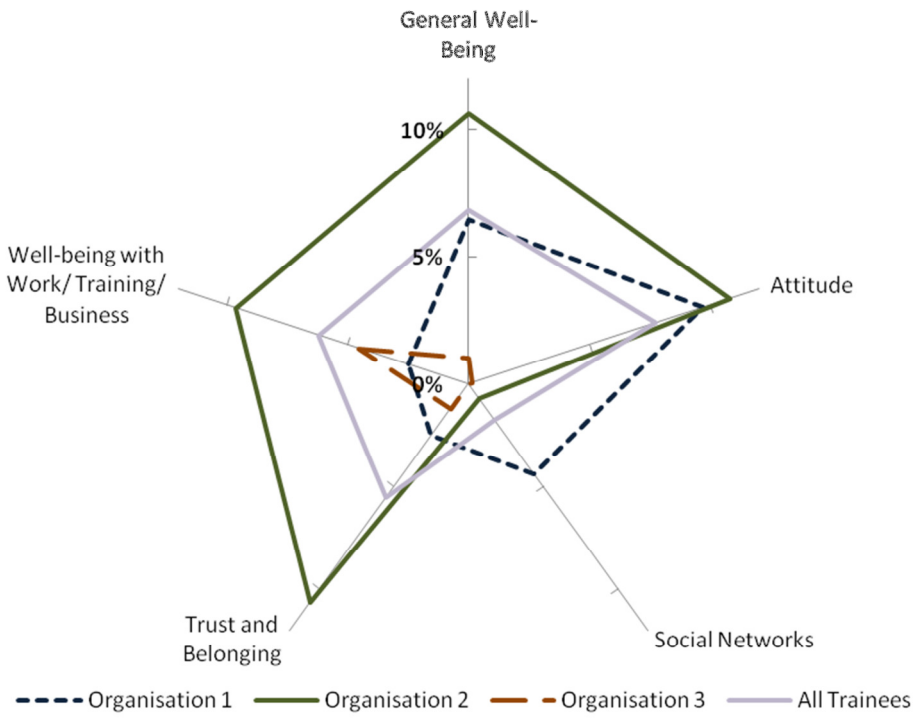


Table 3.6 **Percentage change in the Index of Social Benefits as a direct result of skills training from different organisations**

	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business
Organisation 1	6%	10%	4%	3%	3%
Organisation 2	11%	11%	1%	11%	10%
Organisation 3	1%	0%	0%	1%	5%
All Trainees	**7%**	**8%**	**2%**	**6%**	**6%**

Figure 3.10 and Table 3.7 illustrate changes in IoSB by employment status. It is evident that different types of employment status are associated with different well-being impacts as a direct result of training. For example, unemployed trainees in particular improved their scores for both well-being connected with work, training or business as well as general well-being. Those pursuing a self-employed route can be seen to benefit particularly from improvements to the 'attitude' measure (e.g. feeling better about themselves; feeling more optimistic about the future). This mirrors the quotes above from some of the business trainees.

Figure 3.10 **Percentage change in the Index of Social Benefits as a direct result of skills training by employment status**

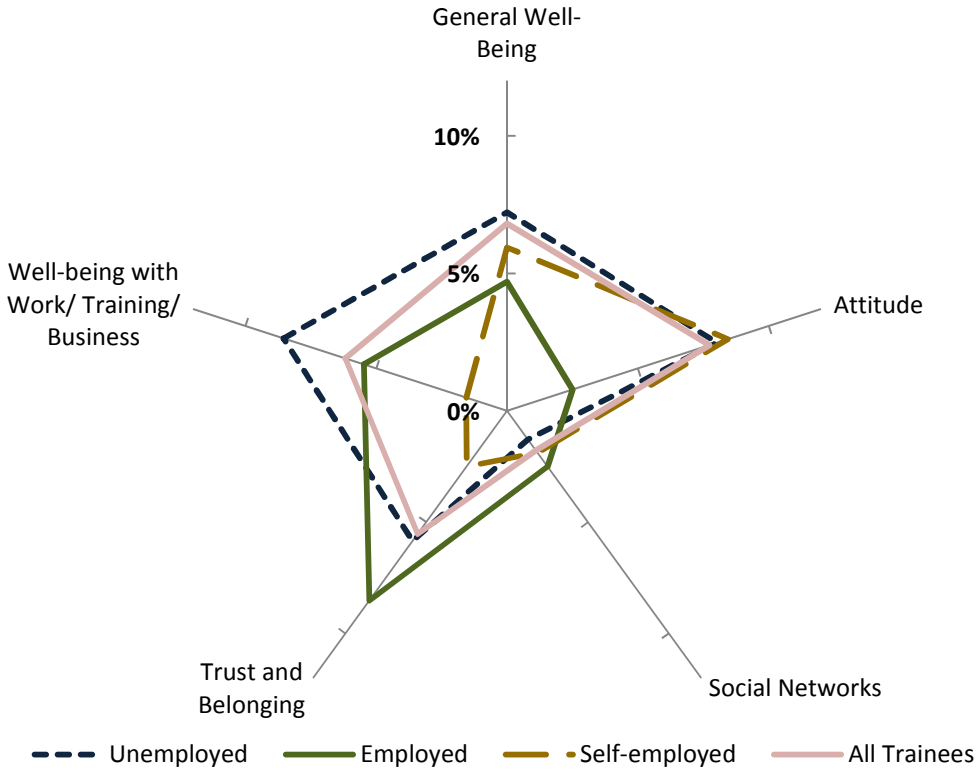


Table 3.7 **Percentage change in the Index of Social Benefits as a direct result of skills training by employment status**

	General Well-Being	Attitude	Social Networks	Trust and Belonging	Well-being with Work/ Training/ Business
Unemployed	7%	8%	1%	6%	9%
Employed	5%	3%	3%	9%	5%
Self-employed	6%	8%	2%	3%	2%
All Trainees	**7%**	**8%**	**2%**	**6%**	**6%**

3.6 Combining IoSB and RoIS

The results for the IoSB point to positive benefits (albeit with wide variation across the sample) resulting from participating in training. Examining the RoIS ISoB together shows a positive correlation (68%). In general, positive changes in RoIS were also reflected in positive changes in individual's ISoB as a result of training. However, since the data is not normally distributed it is not possible to conclude any statistical relationship between the two sets of data.

Although both IoSB and RoIS provide useful indicators of impact, as we have seen the presentation of aggregate results can obscure variation within the sample. Therefore, in order to illustrate the range of different individual circumstances, training experiences and impacts, we have produced three detailed individual profiles. All have worked in the agri-food sector but the type of training they participated in and the associated impacts vary markedly.

The trainee in *Profile 1* is a former employee in Okehampton's food industry who enrolled in training aimed at those wishing to start their own business. The RoIS for this individual was 219%, although their IoSB suggested a more significant social improvement. During the course of the research their employment status changed from unemployed to self-employed.

Profile 2 is also for a former food industry worker. In this case the participant attended a stand-alone training event aimed at those interested in starting their own business. It is clear that for this individual the impact of the training was virtually nothing and any perceived benefits were seen as transitory. This individual remained unemployed throughout their involvement with the research.

Profile 3 reflects a very different set of circumstances. This individual is older, completed only a basic secondary school education (leaving school at 16) and was experiencing long term unemployment. As with profile one, this individual took part in a longer course. The RoIS is 5689% reflecting this person's move from long term unemployment to employment. The individual's non-economic well-being also improved as indicated by the IoSB which points to particular improvements in attitude (i.e. feelings about themselves) and well-being linked to employment status.

Profile 1 ***'Business' trainee taking part in training over one year***[7]

The Trainee

Trainee Background

- Work status: ***Unemployed (less than one year)***
- Age: ***28 years old***
- Sector worked: ***food industry***
- Education: ***A' levels***
- Annual income: ***£6,240***
- Income source(s): ***Benefits***

The Training

Training attended: ***Business start up New Enterprise Allowance Scheme***
Reasons for attending: ***basic start up, registering, business planning, possible grants***
Standalone training or part of a series: ***Part of a series***
Training experience in previous 12 months: ***None***
Expected training in the next 12 months: ***None***
Benefit of training: ***helpful for first time start up, reflective reassurance***
Likelihood of benefits occurring without training: ***Unlikely***
How long benefits expected to last: ***Over 12 months***
Personal costs of training: ***£656***

The Impact from training

Personal impact

Work status change:
Unemployed → Self-employed

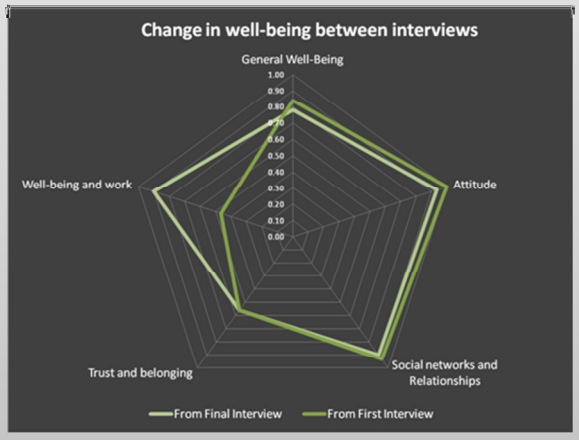
Change in annual income:
£6,240 → £12,160

Change in annual income as a result of training: ***£1,267***

Impact of training to SPO

Changes in well-being from training

General well being:	↑ *13%*
Attitude:	↑ *20%*
Social networks:	↑ *20%*
Trust and belonging:	↑ *15%*
Well being with work:	↑ *15%*



Return on investment from skills training: 219%
For every £1 spent on training for this individual, the return to that individual was £2.19

[7] RoIS = (£1267 - £656)/£241 × 100 = 219%

Profile 2 ***Pathfinder trainee taking part in a standalone event***[8]

The Trainee

Trainee Background

- Work status: ***Unemployed (less than one year)***
- Age: ***21 years old***
- Sector worked: ***food industry***
- Education: ***A' levels***
- Annual income: ***£3,068***
- Income source(s): ***Benefits***

The Training

Training attended: ***Start you own business***
Reasons for attending: ***I am interested in becoming self employed.***
Standalone training or part of a series: ***Standalone***
Training experience in previous 12 months: ***None***
Expected training in the next 12 months: ***First Aid***
Benefit of training: ***To see if self-employment is for me***
Likelihood of benefits occurring without training: ***Very likely***
How long benefits expected to last: ***A few days***
Personal costs of training: ***£1.35***

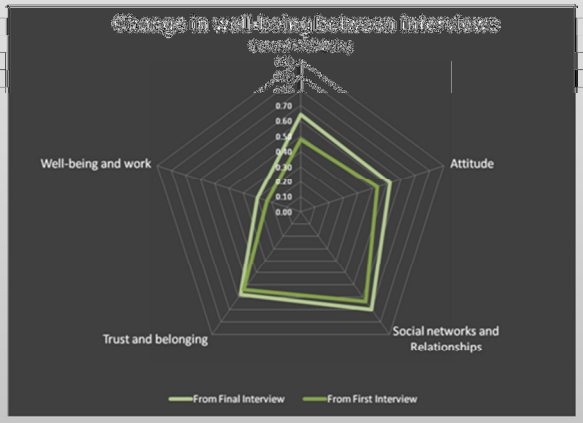
The Impact from training

Personal impact

Work status change:
Unemployed → Unemployed

Change in annual income:
£3,068 → £3,068

Change in annual income as a result of training: ***£0***



Impact of training to SPO

Changes in well-being from training

General well being:	↔ ***0%***
Attitude:	↔ ***0%***
Social networks:	↔ ***0%***
Trust and belonging:	↔ ***0%***
Well being with work:	↔ ***0%***

Return on investment from skills training: 0%
(For every £1 spent on training for this individual, the return to that individual was £0)

[8] RoIS = (£0 - £0)/£450 × 100 = 0%

Profile 3 ***Job support club trainee taking part in training over four weeks***[9]

The Trainee

Trainee Background

- Work status: ***Unemployed (since 2010)***
- Age: ***44 years old***
- Sector worked: ***Agriculture***
- Education: ***School level (left at 16)***
- Annual income: ***£3,640***
- Income source(s): ***Benefits***

The Training

Training attended: ***Ockment Job Support Club***
Reasons for attending: ***Job search***
Standalone training or part of a series: ***Part of a 4 week course***
Training experience in previous 12 months: ***Computing course***
Expected training in the next 12 months: ***None***
Benefit of training: ***Job club support with dyslexia***
Likelihood of benefits occurring without training: ***Unlikely***
How long benefits expected to last: ***A few months***
Personal costs of training: ***£9.00***

The Impact from training

Personal impact

Work status change:
Unemployed → Employed

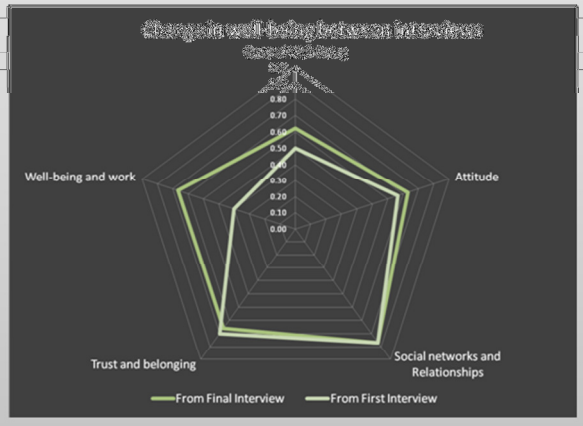
Change in annual income:
£3,640 → £10,000

Change in annual income as a result of training: ***£2,000***

Impact of training to SPO

Changes in well-being from training

General well being:	↔ *0%*
Attitude:	↑ *20%*
Social networks:	↔ *0%*
Trust and belonging:	↔ *0%*
Well being with work:	↑ *35%*



Return on investment from skills training: 5689%
(For every £1 spent on training for this individual, the return to that individual was £56.89)

[9] RoIS = (£2000 - £9)/£35 × 100 = 5689%

3.7 Time decay

The length of time that training benefits and outcomes last varies considerably. For example, providing training on starting and running a business may produce a quantifiable benefit that lasts for years. The benefits of other training may recede more rapidly over time. While this was not directly measured in the research, trainees were asked how long they expected the benefits of training would last. Most, 80%, thought that the benefits would last for at least a few months, while 46% thought they would last more than one year (see Figure 3.11). Trainees from Organisation 1 were more likely to expect the benefits to last longer. In addition, those who were employed were more likely to expect the benefits from training to last more than a year compared to those in self-employment. These findings are consistent as trainees with SPO 1 were more strongly associated with being employed while those with SPO 2 were more likely to be self-employed. The provision of some form of on-going, albeit sporadic, support may offer a means of reducing the extent to which the benefits of training recede over time (although there was no scope to measure this within the bounds of this research project).

Figure 3.11 Time decay in benefits gained from training for each organisation

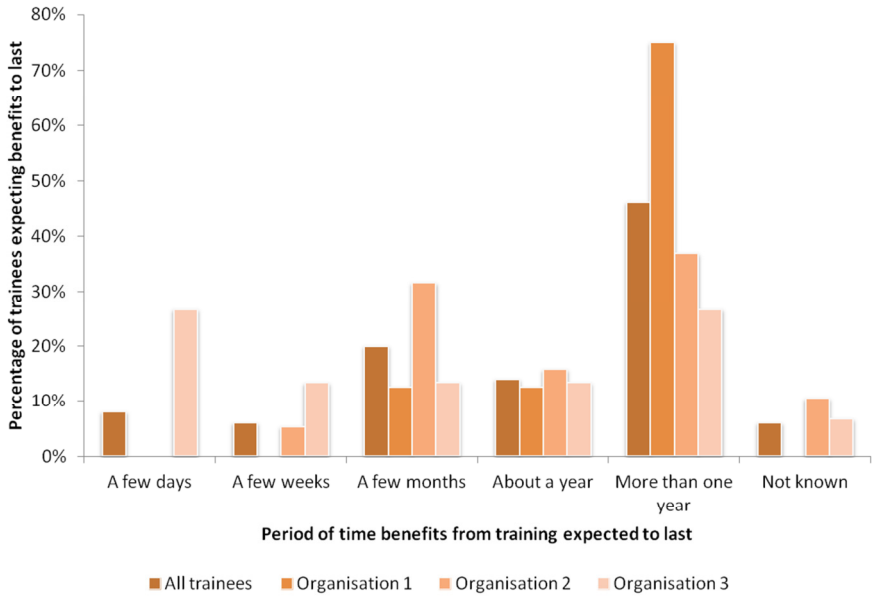
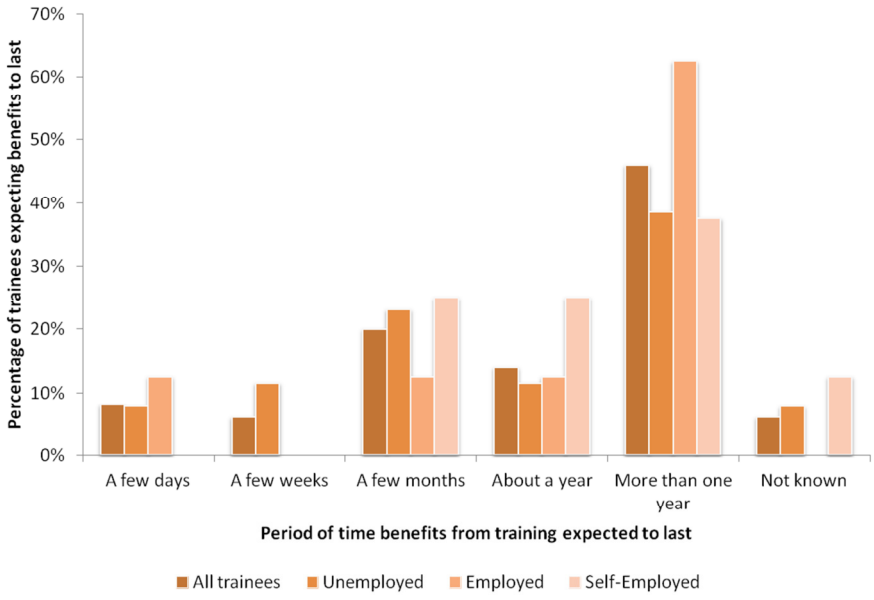


Figure 3.12 Time decay in benefits gained from training depending on employment status



4. Conclusions and Recommendations

This research set out to demonstrate the impact of training provision by SPOs, and in doing so aimed to test a bespoke methodology involving the calculation of both RoIS and IoSB based on an automated questionnaire built using Excel. The research was particularly timely given the large scale redundancies in Okehampton's food sector. The two-stage recruitment process, first recruiting SPOs, and then through those organisations contacting and recruiting trainees to take part in the interviews was more challenging and time consuming than anticipated. The research relied on the training organisations who themselves have come under great pressure at various times in the research, with key people being unavailable to support the research. In addition recruiting and sustaining contact with trainees, many of whom were experiencing a difficult period in their lives, was also challenging and time consuming.

The result was that the eventual sample of trainees was smaller than hoped. It was large enough to test the tool but a larger sample (in the region of 100) would have enabled more detailed analysis such as comparisons between trainees with different levels of educational attainment. One way to have increased the sample would have been to work with a greater number of SPOs. That said, developing and managing the relationships with SPOs was time consuming and within the time and financial constraints of the research three SPOs was probably as many as we could manage. Making initial contact with trainees, many of whom were facing significant challenges in their lives, was time consuming and there is clearly a trade-off between increasing the sample size and the time and staff effort required to recruit participants. Once trainees were recruited arranging the second interview was easier as many appreciated someone taking an interest in their story. They also appreciated receiving a £30 voucher in return for taking part in two interviews. We assume that most if not all would also have been willing to participate in a third interview if time had been available.

Despite these limitations the results demonstrate the economic return to investment in skills training as well as the impact on well-being. Across the sample as a whole the RoIS was 916%. In other words, for every £1 of cost incurred in the delivery and participation in training (by both the SPO and trainee), the benefit that accrued in terms of the individual was £9.16. Presentation of the IoSB results is more complex but in many cases taking part in training was associated with positive changes in the five dimensions of the IoSB. That said the scale of both impacts has been shown to vary considerably. This is for a range of reasons: the initial starting position of the individual trainee and subsequent developments in that position which are associated with training; the type of training – one-off, stand-alone events are less likely to produce an impact; and the costs faced by the training providers themselves. Our results suggest that impact is greatest for those who move from a position of unemployment to being either employed or self-employed (although this would also apply to an individual moving from a low paid position). In addition to the economic return from investment in training it is clear that there are a range of incidental impacts particularly on self-confidence, feelings about self and also social contacts. This research did not attempt to place a monetary value on these less tangible benefits but did identify a positive correlation between RoIS and IoSB.

Two of the SPOs taking part in the research have seen the results and have had the opportunity to discuss them. They were pleased with the outcome and thought that being able to demonstrate their impact in this way would be beneficial for future funding bids. They also indicated that they would consider using the impact tool, although they were aware that this would have cost implications for them in terms of staff time. On the other hand the impact tool developed in this research would be easier to use with a group of people closely involved with the organisation testing the impact of the service – that would overcome one of the main difficulties i.e. recruitment of people willing to take part in the study.

The questionnaire, although complex and interactive was comparatively simple to use by our field researcher. Various iterations were trialled and developed to assist in delivering a consistent and logical sequence of questions and options. Trainees were intrigued by the complexity and nature of the well-being questions but on no occasion refused to answer. By the second interview there was evidence that they valued a personalised follow up on their circumstances.

The nature of the Proving Our Value project required collaboration between university based academic researchers and CCD. From CCD's point of view, there has been a great deal of value in working with the University in refining the questionnaire tool as the work has progressed. This process has been on-going throughout the project. Although this is a very constructive process it posed some practical difficulties. For instance, in order to collect data from the second set of interviews, the first batch of interviews had to be transferred to a second questionnaire. This required close partnership working between Exeter University and the Community Council of Devon and has resulted in the development of a good working tool which can be used in the field. Guidance on using the impact tool is presented in Appendix 5. The tool itself is available as an Excel file either from the authors of this report or from South West Forum.

In terms of impact the project has improved the research expertise of CCD staff and produced a tool that has the potential to be taken up by a wide variety of training providers. We have demonstrated the positive socio-economic impacts associated with training provided by two SPOs and from a University of Exeter perspective we have developed a tool that we would have been unlikely to have had the resources to develop without the Proving Our Value research.

A number of recommendations flow from this research:

- In the Okehampton context and given limited resources in the first instance, training should be targeted at people who are unemployed and/or aiming to establish their own business. Elsewhere this recommendation would need to be considered within the context of local labour market characteristics.
- Longer term training is more effective than stand-alone training (although there is still a role for short, one-off training events). Therefore resources should be targeted towards longer term training (albeit within the confines of the 16 hour rule). This would also benefit training providers who currently face a series of short term and uncertain funding sources.

- Due to the relatively small sample size in this research it is recommended that the impact tool is used on a larger sample. This will aid further refinement and help clarify some of the training impacts reported here.
- The impact tool is designed to be relatively easy to use and analysis of data collected has been automated. Nevertheless some resource would be required to train potential users. This would not be expensive.

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Appendix 1 SPOs providing training in and around Okehampton (October 2011)

Organisation Name + legal structure	Purpose/remit/reach	Number of staff in organisation (plus volunteers?)	Numbers delivered training to over the last 12months /What training are you planning to deliver in next 12month.	Key contact /link to website other notes
Ockment centre Charitable company limited by guarantee	The charity provides and maintains a community centre for the inhabitants of the parishes of Okehampton and surrounding area, for meetings lectures and classes and for other forms of recreation and leisure time. Occupation with the object of improving the conditions of life for the inhabitants. The Centre is open 9am - 5pm Monday to Friday, evenings and weekends as required. The Ockment Centre has been running for several years offering a range of open distance learning in a variety of subjects. Now under the management of Pathfinder Trust It will continue to provide a vital service in the heart of the community.	Number of staff 7 Number of volunteers. 2	Do not deliver much training as have path finder. They have delivered first aid training. Only a few attended. They deliver the work club joint with Pathfinder. No Plan to deliver any training in next 12 months.	Telephone: 01837 53276 Fax: 01837 55004 email: ockment@netscape.net Spoke to Lindsey. (Kerry may be able to provide more detail). http://www.okehampton.com/home The Centre was invited to take part in some national research by NPC and IVAR to look at the value and impact in the community of multipurpose organisations. A grant of £1,000 was awarded to cover expenses.

Westward Pathfinder (formerly North Devon Pathfinder Trust) is a local charity set up in 1999. Charitable company limited by guarantee	Aim to assist individuals and communities within Devon to participate in their own economic and social development through the use of new Information and Communication Technologies. Westward Pathfinder is responsible for the development and management of Pathfinder Learning Centres which now includes the Pathfinder Centre (based In the Ockment centre) Types of learning/training provided European Computer Driving Licence. National tests in Numeracy & Literacy Level 1 and 2 NVQs in Customer Service and Business Administration Project Management - Setting Up Your Own Business - Marketing, Unleashing the Potential of Your Business - Essential Business Skills—DDA Awareness—Health & Safety—Communication Skills - Decision Making - Problem Solving - Time Management	Number of staff 40 Number of volunteers 12 (this is across the centres)	Numbers delivered training to over the last 12months In excess of 200.in Okehampton area What training are you planning to deliver in next 12 months. This year they are offering various computers training including, Go-on, foundation courses, level one Cliat and ECDL essentials. ECDL extra or ECDL Flexequal at level two. We are also delivering NVQ's in Business administration and Customer Service. We can also deliver the new apprenticeships scheme, Qualification aim: A level 2 Customer Service Qualification. Training does not include agri-food, land and or environmental focus.	Chief Executive - George Curry: (01271) 818071 Mobile: **07989 398040** **gcurry@pathfinder.org.uk** Centre Manager - Geoff Mills gmills@pathfinder.org.uk Skills for Life Tutor Angela Dacres-Dixon adacres-dixon@pathfinder.org.uk http://www.path-finder.org.uk/okehampton/home.htm 01837 500500

BTCV Charitable company limited by guarantee NB BTCV Enterprises is a trading company limited by shares and BTCV is the sole shareholder.	Charity focus is environmental conservation volunteering throughout the UK and around the world. BTCV has a complete training programme that covers topics from practical conservation to personal development including: Long Courses Over 1,000 Short Courses The BTCV Green Gyms is a form of training through a range of practical projects, which tackle physical jobs in the outdoors. BTCV Employment Services is part of the BTCV Group of companies owned by BTCV, the leading environmental charity. Currently contracting with the Department for Work and Pensions and other providers of welfare to work and training contracts.	Number of staff 3 in Exeter office Number of volunteers. They have two volunteers groups at present about 20 people. Other national statistics 9 England Regional offices 184 offices 767 employees 300 Volunteer officers BTCV works with 628,000 volunteers a year	Numbers delivered training to over the last 12months 2 people What training are you planning to deliver in next 12 month? The courses run on an ongoing basis - students can enrol at any time.NPTC Level 2 Diploma in Work- Based Environmental Conservation. Also offer courses in Horticulture. http://www.btcv.org.uk/cgi-bin/office_opps_ind.cgi?ref=4150&region=sw The course largely consists of outdoor practical conservation work learning on the job while carrying out projects such as hedge laying, tree planting, and footpath work and scrub clearance. Have been running the course since April 2011. Provide transport from Exeter bus station or pickup from anywhere on the main road between Bow-Exeter (A377).	Exeter office Contact: Kari Bettoney: Training Officer 01392 496687: k.bettoney@btcv.org.uk http://www2.btcv.org.uk/display/home

BIP Company limited by Guarantee	Describe themselves as an enterprise agency. BIP has been providing high quality advice and training since 1993. Our expertise is founded upon practical business experience in small business. Our aim is to help businesses with their development and sustainability by improving their competitiveness, leading to increased profitability and employment.	Number of staff 7 staff. Number of volunteers delivering a volunteer mentoring programme	90 people trained in the last 12months (mainly 25 plus). Training all relating to business skills. /vocational training/finance/marketing/IT one to one on business diversification/. Focus on training over the next 12months is on unemployed people (have job centre plus contract. No focus on agri/food. Although those unemployed are likely to have some from that background. Also specialise in supporting farming business	Stewart Horne, Managing director http://www.bipwestdevon.biz/agricultural-support.html
Lantra sector skills Charitable company limited by guarantee	The charity aims to make a difference by helping businesses understand that through the development of the skills base of their employees they can improve their business. Its main activities focus on developing and recognising the skills of the workforce, raising the quality of new entrants to the sector and influencing government and agencies on behalf of the sector. Lantra helping land-based and environmental businesses access training, qualifications, skills and knowledge they need.	Number of staff Number of volunteers.	Numbers delivered training to last 12 months Planned training next 12 months	Lantra Head Office Telephone: 02476 696996 http://www.lantra.co.uk/Contact-Us.aspx#offices research@lantra.co.uk rebecca.hodgson@lantra.co.uk http://www.lynhertraining.co.uk/about/

HOGCO Project within the community Council of Devon Charitable company limited by guarantee	Home Grown - Community Owned (HogCO) is a 5 year programme working with rural communities across Devon to support local food projects. They help groups to join together to develop skills and seek opportunities to grow their own food. The Project works across rural Devon (excludes Torbay, Exeter & Plymouth).	Number of staff 2 staff Carol Stone. And Lois Gallimore. Number of volunteers. 800 volunteers across Devon.	Numbers delivered training to last 12 months 4 from Okehampton area 64 60 outside Planned training next 12 months Planning 4 sessions in Chagford also will be starting work with a new group in Okehampton. Okehampton Community Garden' They are keen for it to be a space open to everyone from the community to come and learn how to grow food, make friends and learn new skills. They are in the process of signing the lease with Okehampton United Charity, who own the 3-4 acre site. From initial discussions it sounds as if they will start by leasing an acre and then extend into the rest of the site as and when there is enough interest. Similarly they will start with vegetables but are keen to keep chickens and bees in the future.	http://www.hogco-devonrcc.org.uk/ .

Made –Well UK Community Interest company	Based at Hatherleigh, Made -Well UK was amongst the successful applicants to receive funding from the Local Food Programme. This enables them to create a dedicated horticulture site along with training facilities, a shop and a cafe to promote a better understanding and appreciation of food, healthy lifestyles, and to give local people access to affordable home-grown food. The CIC work closely with Lyndridge care home http://www.lyndridgecare.co.uk/ Provide them with food, a lot of the staff also work for lyndridge care.	Number of staff 20 though many very part time Number of volunteers 10 6 directors, these are people from the community.	Numbers delivered training to last 12 months 30 Planned training next 12months, plan to double this to 60. Currently developing a number of training offers working with Petroc to develop the formal training provision. In the near future. Hope to be running QCF accredited courses in horticulture and cooking. From September 2012 Are planning a wide range of formal training opportunities in Horticulture Animal Care Retail Cooking Manufacturing (including woodwork).	Staff Carol Barkwell 07785 971960 carol@lyndridge.freeserve.co.uk Amanda Bowen 07826 935446 http://www.made-well.co.uk/

National Trust Charitable company limited by guarantee	Charity that works to preserve and protect historic places and spaces - for ever, for everyone.	Number of staff Nationally –4,000 staff Castle Drogo – regular 27, seasonal 30 Number of volunteers. 62,000 nationally 170 at Castle Drogo	Numbers delivered training to last 12months Training for 80 volunteers on fire awareness update 80 volunteers customer service & staff training Food hygiene training approx 8 Retail induction 4 Membership sales training – 6 Induction for new volunteers – 10 Fire safety awareness – 30 approx Gardening specific training – 20 Countryside specific training – 10 Conservation training - 5 First aid training - 10 Planned training next 12months Similar programme as above – refreshers and review. Garden team have historically had compost days or will have coaching or training on HLS schemes or other relevant areas.	Devon Regional Office Killerton House 01392 881691 Community & Volunteering Officer for Devon & Cornwall. anthony.sandham@nationaltrust.org.uk (Cornwall contact 01208 265 249) Hannah Jones, Community, Learning and Volunteering Manager, The National Trust, Devon & Cornwall Region, Lanhydrock, Bodmin, PL30 4DE 01208 74281

West Country Rivers Trust Charitable company limited by guarantee	The West Country Rivers Trust is an environmental charity established in 1995 to secure the preservation, protection, development and improvement of the rivers, streams, watercourses and water impoundments in the West Country and to advance the education of the public in the management of water. One of the main remits of the Trust is to advance the education of the public in water management. Here at the West Country Rivers Trust we believe that education should span across generations and as such we have developed a wide variety of educational activities.	Number of staff 23 Number of volunteers 10	Numbers delivered training to last 12 months None Planned training next 12 months Will not be delivering training to local people. Training does have an agri-environmental focus when we run it but it tends to be for national rivers advisors not local people.	http://www.wrt.org.uk/index.html info@wrt.org.uk (01579) 372140 info@wrt.org.uk www.wrt.org.uk

Okehampton Council for Voluntary Service. Charitable company limited by guarantee	West Devon Community and Voluntary Services are dedicated to promoting voluntary community action by working with local voluntary and community organisations. offices in Okehampton and Tavistock. West Devon CVS supports these organisations for example by: Developing the capacity, skills and knowledge of groups and volunteers through training events and one to one development support; Providing information through our newsletters, information bulletins and voluntary sector forums	Number of staff 5 part time Number of volunteers 12 (6 volunteers)	Numbers delivered training to last 12months 34 groups attended local training courses Planned training next 12months 4 training session planned so far for next year, they had not planned past April, though likely to be more training. The training focus is on governance for trustees. There is no agri environmental focus. They have run food hygiene, courses in the area.	Karen Nolan CEO 01837 53392 karen@westdevoncvs.org.uk
Age Concern Okehampton and Torridge *is* NOT *Age UK* Working in and around West Devon, Torridge and Dartmoor. Unincorporated Charity.	Vision of charity is to promote the well-being of all older people and to help make our later lives a more fulfilling and enjoyable experience. Range of services, legal/health advice.	Number of staff Number of volunteers	Numbers delivered training to last 12 months. Planned training next 12 months Offer friendly help, with simple computer courses, but with learning based on 'need to know' and interest-based sessions. Trainer available - drop in the Okehampton centre	01837 55838 http://www.acotcomputer.btck.co.uk/

Devon Young Farmers	Skills, training, business support, regular meetings, information sharing, lobbying, newsletters.	Number of staff Staff 1 full time 5 part time Number of volunteers 400	Numbers delivered training to last 12months Have delivered fire safety training in Chagford and Okehampton (60). Other training chain saw course/sharing course /trailer training and Fresh start (3) Fresh start focuses on farming business skills e.g Business planning, farming cooperatives /finance /capable allowance. Planned training next 12months This is members driven e.g they wait for members to phone in with training needs and then organise according. So there may be training but they will not know until members phones in.	Federation Organiser nick@devonyfc.co.uk DFYFC, YFC Centre Retail Park Close Marsh Barton Road Exeter, Devon EX2 8LG **Tel:** 01392 272189 **Fax:** 01392 274552
Okehampton Community Recreation Association – OCRA Charity	OCRA is a charity that aims to maintain and develop sporting /recreational opportunities and facilities for Okehamton and the large surrounding area.	Number of staff 2 full time staff and up to 40 session staff. Number of volunteers 40 volunteers	Numbers delivered training to last 12 months. 40 Planned training next 12 months. Aiming for 60 Training includes first aid, child protection, young sports makers volunteers scheme/bush craft, health living courses.	Stuart Lord Manager admin@ocrasport.org.uk OCRA C/O Okehampton Community College Mill Road Okehampton Devon EX20 1PW Call: (01837) 54546

Appendix 2 The SOUL Record adult questionnaire

		How do you feel today: ☹ 😐 ☺						
1 = strongly disagree, 2 = disagree, 3 = slightly disagree, 4 = slightly agree, 5 = agree, 6 = strongly agree								
Attitude	1	I make a real effort to do those things that matter to me	1	2	3	4	5	6
	2	I feel good about myself	1	2	3	4	5	6
	3	I am a confident person	1	2	3	4	5	6
	4	I get on well with people	1	2	3	4	5	6
	5	I am able to receive advice	1	2	3	4	5	6
	6	I respect other people's property	1	2	3	4	5	6
	7	I use my initiative	1	2	3	4	5	6
Personal/inter-personal	8	I communicate well with other people	1	2	3	4	5	6
	9	I feel part of the community	1	2	3	4	5	6
	10	I feel part of this organisation	1	2	3	4	5	6
	11	I am willing to take on responsibility	1	2	3	4	5	6
	12	I enjoy working as part of a team	1	2	3	4	5	6
	13	I take care of my appearance	1	2	3	4	5	6
	14	I am reliable and turn up to appointments on time	1	2	3	4	5	6
Practical	15	I am aware of health and safety issues	1	2	3	4	5	6
	16	I am able to find/share information	1	2	3	4	5	6
	17	I carry out any task that I am set or set myself	1	2	3	4	5	6
	18	I am well organised	1	2	3	4	5	6
	19	I am aware of my rights and responsibilities	1	2	3	4	5	6
	20	I am able to manage my money well	1	2	3	4	5	6
	21	I can fill out forms properly	1	2	3	4	5	6

Appendix 3 New Economics Foundation National Accounts of well-being questionnaire

Question	Component (subcomponent)	Aligned scale
Taking all things together, how happy would you say you are?	Emotional well-being *(positive feelings)*	0–10
How much of the time during the past week were you happy?	Emotional well-being *(positive feelings)*	1–4
How much of the time during the past week have you enjoyed life?	Emotional well-being *(positive feelings)*	1–4
How much of the time during the past week have you felt depressed?	Emotional well-being *(absence of negative feelings)*	1–4(inv)
How much of the time during the past week have you felt sad?	Emotional well-being *(absence of negative feelings)*	1–4(inv)
All things considered, how satisfied are you with life as a whole nowadays?	Satisfying life	0–10
How satisfied are you with how your life has turned out so far?	Satisfying life	0–10
How satisfied are you with your present standard of living?	Satisfying life	0–10
On the whole my life is close to how I would like it to be (agree – disagree)	Satisfying life	1–5 (inv)
How much of the time during the past week have you felt tired?	Vitality	1–4(inv)
How much of the time during the past week have you felt that everything you did was an effort?	Vitality	1–4(inv)
How much of the time during the past week could you not get going?	Vitality	1–4(inv)
How much of the time during the past week has your sleep been restless?	Vitality	1–4(inv)
How much of the time during the past week have you had a lot of energy?	Vitality	1–4
How much of the time during the past week have you	Vitality	1–4

felt rested when you woke up in the morning?		
How is your health in general?	Vitality	1–5 (inv)
My life involves a lot of physical activity (agree – disagree)	Vitality	1–5 (inv)
In general I feel very positive about myself (agree – disagree)	Resilience and self-esteem (self-esteem)	1–5 (inv)
At times I feel as if I am a failure (agree – disagree)	Resilience and self-esteem (self-esteem)	1–5
I'm always optimistic about my future (agree – disagree)	Resilience and self-esteem (optimism)	1–5 (inv)
When things go wrong in my life, it generally takes me a long time to get back to normal (agree – disagree)	Resilience and self-esteem (resilience)	1–5
In my daily life I get very little chance to show how capable I am (agree – disagree)	Positive functioning (competence)	1–5
Most days I feel a sense of accomplishment from what I do (agree – disagree)	Positive functioning (competence)	1–5 (inv)
In my daily life, I seldom have time to do the things I really enjoy (agree – disagree)	Positive functioning (autonomy)	1–5
I feel I am free to decide how to live my life (agree – disagree)	Positive functioning (autonomy)	1–5 (inv)
How much of the time during the past week have you felt bored?	Positive functioning (engagement)	1–4(inv)
How much of the time during the past week have you been absorbed in what you were doing?	Positive functioning (engagement)	1–4
To what extent do you get a chance to learn new things?	Positive functioning (engagement)	0–6
To what extent do you feel that you get the recognition you deserve for what you do?	Positive functioning (meaning and purpose)	0–6
I generally feel that what I do in my life is valuable and worthwhile (agree – disagree)	Positive functioning (meaning and purpose)	1–5 (inv)
How much of the time spent with your immediate family is enjoyable?	Supportive relationships	0–6
How much of the time spent with your immediate family is stressful?	Supportive relationships	0–6 (inv)

How often do you meet socially with friends, relatives or colleagues?	Supportive relationships	1–7
There are people in my life who really care about me (agree – disagree)	Supportive relationships	1–5 (inv)
Do you have anyone with whom you can discuss intimate and personal matters?	Supportive relationships	1–2 (inv)
How much of the time during the past week have you felt lonely?	Supportive relationships	1–4(inv)
To what extent do you feel that people in your local area help one another?	Trust and belonging	0–6
To what extent do you feel that people treat you with respect?	Trust and belonging	0–6
I feel close to the people in my local area (agree – disagree)	Trust and belonging	1–5 (inv)
To what extent do you feel that people treat you unfairly?	Trust and belonging	0–6 (inv)
Most people can be trusted, or you can't be too careful?	Trust and belonging	0–10
All things considered, how satisfied are you with your present job?	Well-being at work	0–10
How satisfied are you with the balance between the time you spend on your paid work and the time you spend on other aspects of your life?	Well-being at work	0–10
How much of the time do you find your job interesting?	Well-being at work	0–6
How much of the time do you find your job stressful?	Well-being at work	0–6 (inv)
How likely would you say it is that you will become unemployed in the next 12 months?	Well-being at work	1–4(inv)
Considering all my efforts and achievements in my job, I feel I get paid appropriately?	Well-being at work	1–5

Appendix 4 Index of Social Benefits

General well-being

Taking all things together, I am a happy person

Much of the time in the past week I have been happy

Much of the time in the past week I have felt depressed

Taking all things together, nowadays I am, on the whole, satisfied with my life

I am very satisfied with my how my life has turned out so far

I am very satisfied with my standard of living

Much of the time in the past week I have felt tired

Much of the time in the past week my sleep has been restless

Much of the time in the past week I have had a lot of energy

Generally, my health is very good

Attitude

In general I feel very positive about my self

At times I feel that I am a failure

I am optimistic about my future

If situations change quickly, I find it easy to adapt

In my daily life, I get very little chance to show how capable I am

Most days, I feel a sense of accomplishment from what I do

Much of the time in the past week, I have felt bored

I get many chances to learn new things

I generally feel that my life is valuable and worthwhile

Social Networks and Relationships

Much of the time I spend with my immediate family is enjoyable

Much of the time I spend with my immediate family is stressful

I often meet socially with friends, relatives or colleagues

There are people in my life who really care about me

There are people in my life with whom I can discuss intimate and personal matters

Much of the time in the past week, I have felt lonely

Trust and Belonging

I feel that most people in my local area help one another

I often take part in local community or voluntary groups

I feel that most people treat me with respect

I feel close to the people in my local area

I feel that most people can be trusted

Well-being and Self-employment/Work/Unemployment

All things considered, I am satisfied with my current unemployment status

I am satisfied with the balance between looking for work and other aspects of my life

Much of the time I find my unemployment interesting

Much of the time I find my unemployment stressful

I expect to be unemployed in 12 months time

Considering all my efforts and achievements, I feel that my present income is appropriate

Appendix 5 Guidance on using the RoIS/IoSB impact tool

The data for individual RoIS/IoSB tool is collected using an interactive spread sheet questionnaire. There are five parts to the first interview and three parts to the second interview. At the end of the first interview it is possible to view the individual's IoSB. At the end of the second interview it is possible to view both the IoSB and the individual's RoIS, providing the organisational full (including all overheads) cost of training per individual is entered. The sections of the questionnaire are listed below.

Interview 1

Open part 1 of interview

Open part 2 of interview - training

Open part 3 of interview - costs of training

Open part 4 of interview - work and income

Open part 5 of interview - well-being

Interview 2

Open part 6 of interview - training

Open part 7 of interview - work and income

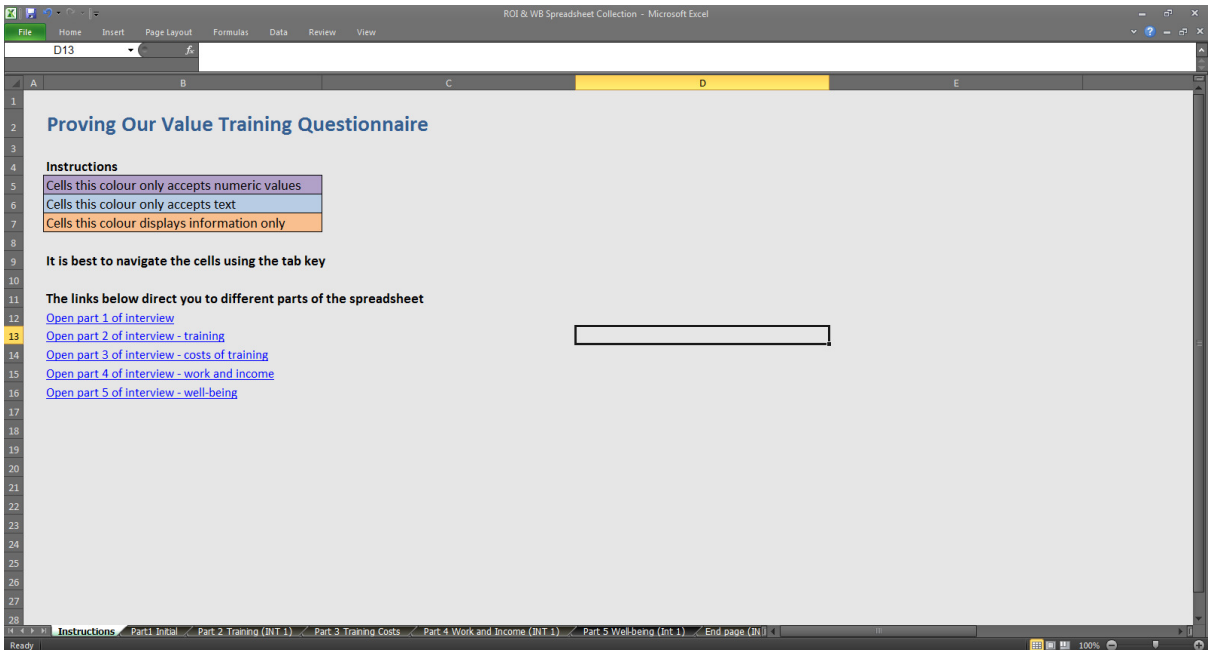
Open part 8 of interview - well-being

Data presentation

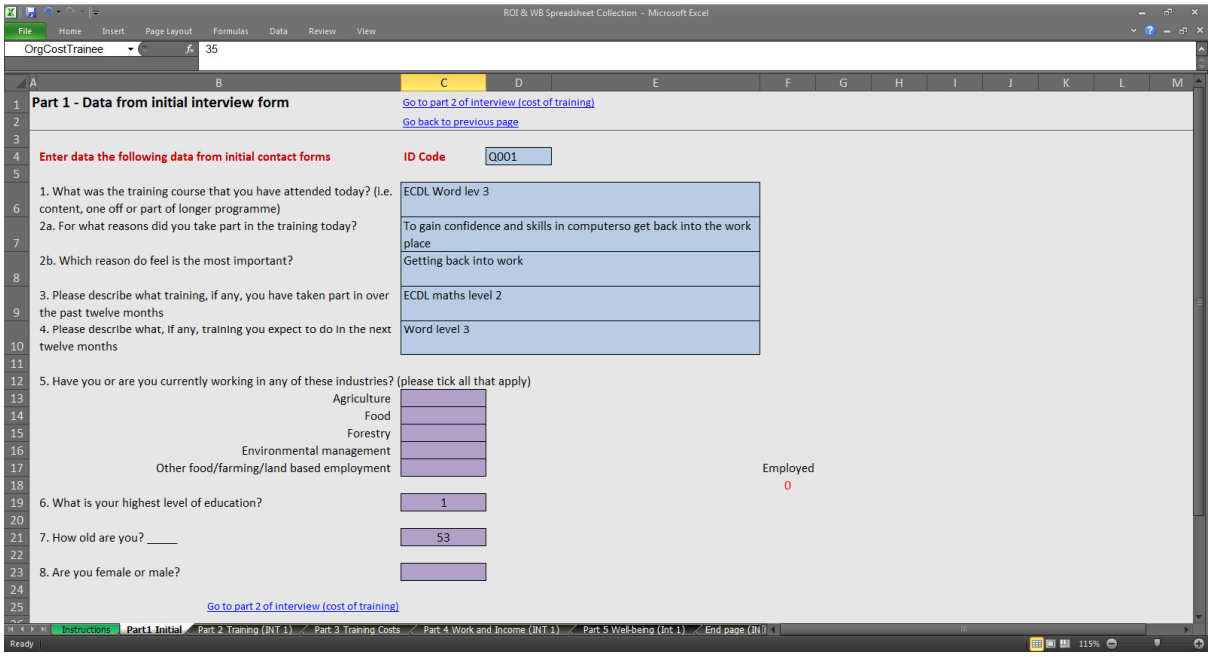
View well-being chart

Return on Investment in training

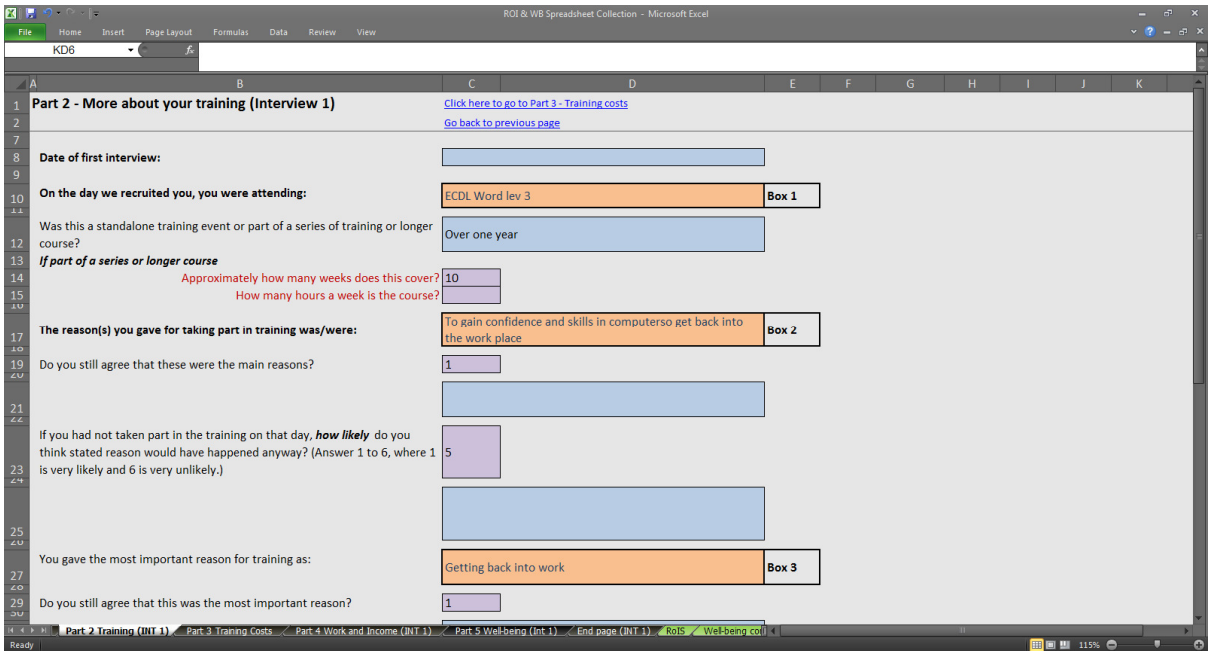
Screenshot - Front page of the RoIS/ISoB data collection tool – This gives details of the type of data for each cell. Each cell is protected so it only allows the prescribed data to be entered.



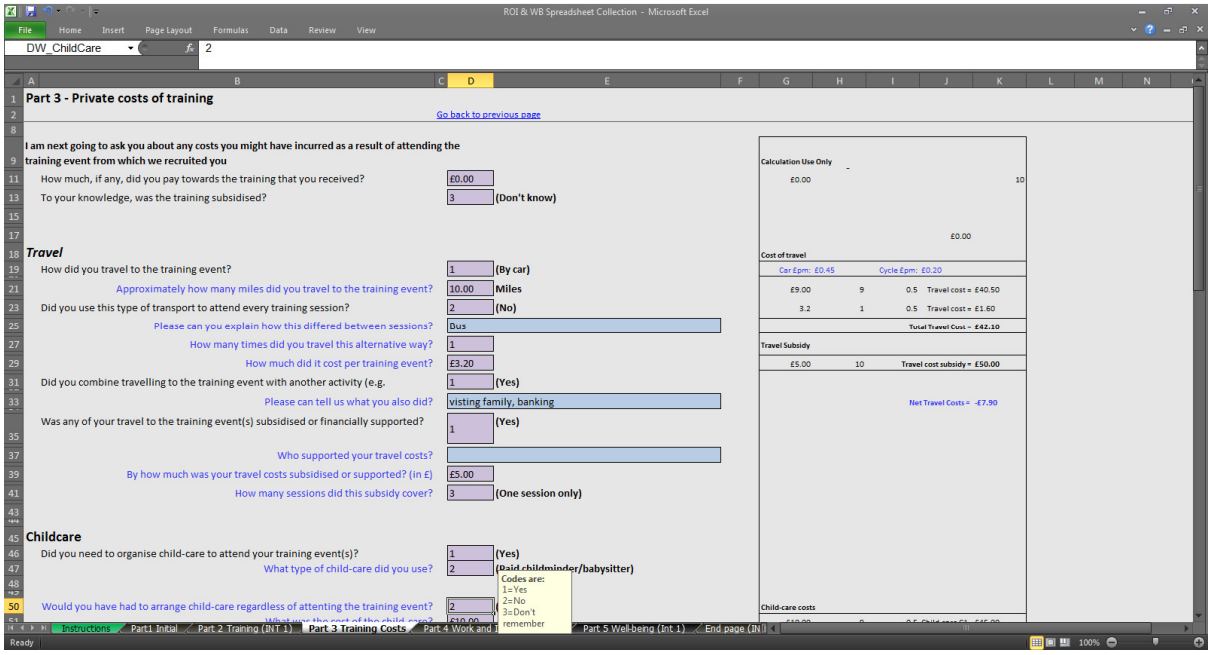
Screenshot of Part 1 - Part 1 of the interview tool collects background information about the trainee prior to the first interview. The interviewer enters this data into the sheet prior to the first interview and adds the organisational cost of training the interviewee.



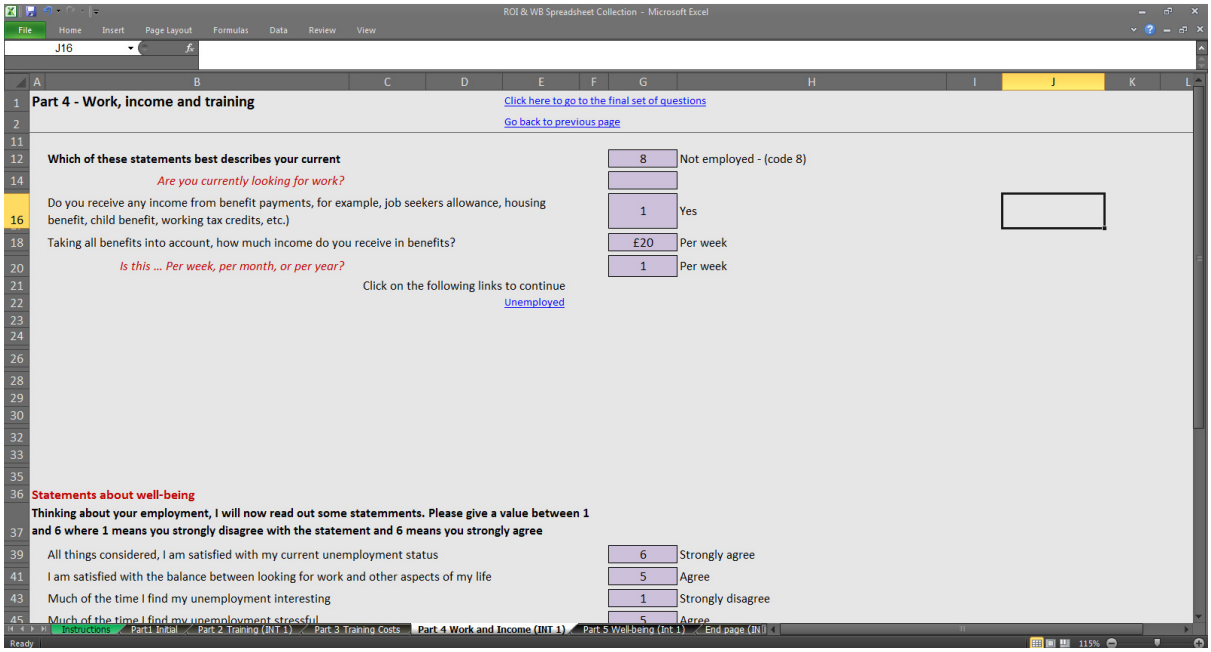
Screenshot of Part 2 – Part 2 of the data collection tool collects data about the training that the interviewee is attending, checks that the information in Part 1 is still valid and the benefits that the interviewee expects from training.



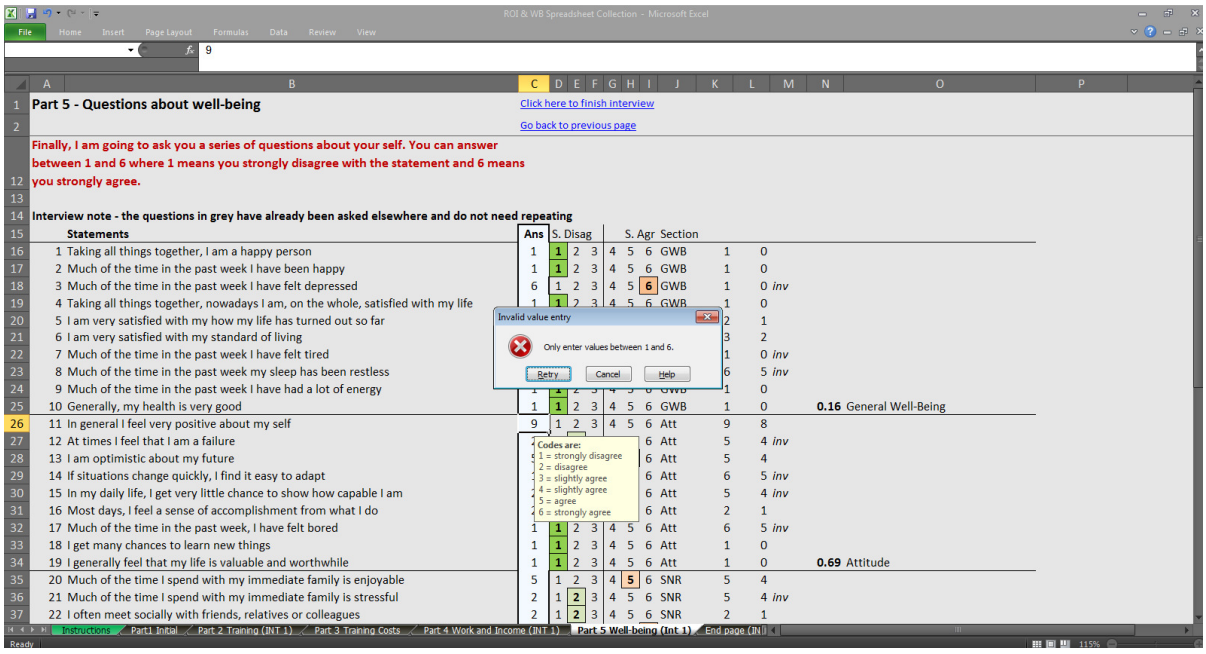
Screenshot of Part 3 – Part 3 of the data collection tool collects the private costs of training – how much the interviewee pays for travel, child-care and/or other costs. As the data collection tool is interactive, certain questions flag up other questions. While this interactivity is difficult to see on the screenshots, the blue text is that which has been generated in response to the answer of a previous question. Many of the purple (cells for numeric values) and blue cells (for text values) have pop-up comments that enable the interviewer to identify different categories to aid the interviewee in their answers.



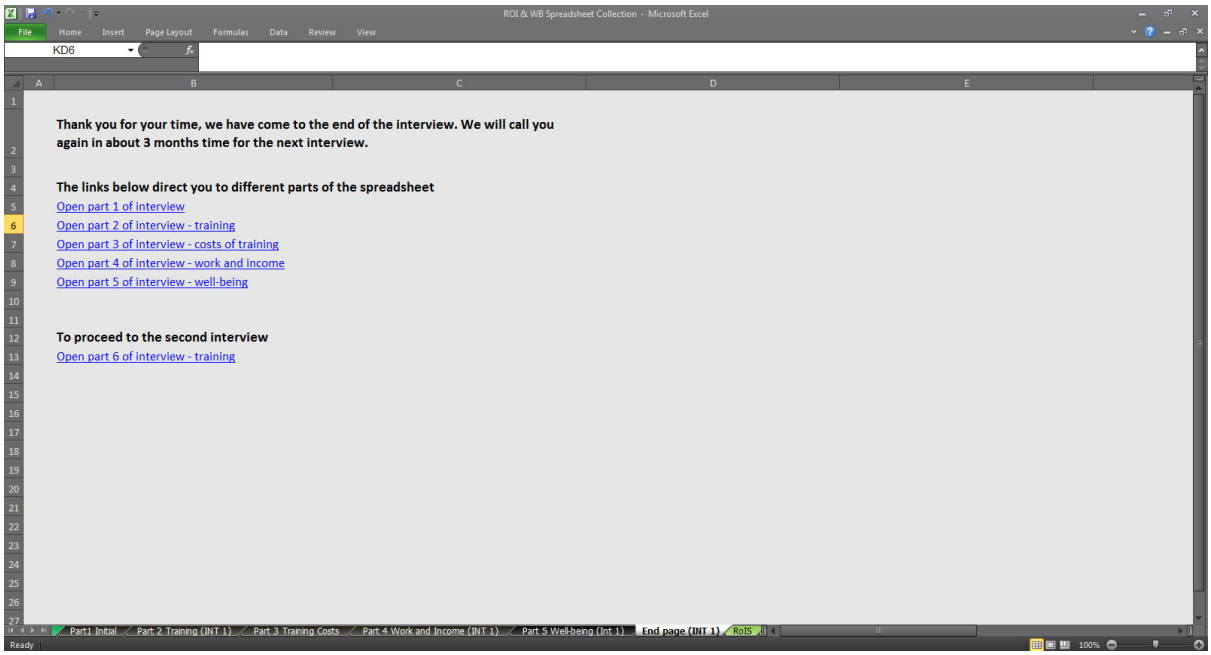
Screenshot of Part 4 – Part 4 collects information about the interviewees work and income



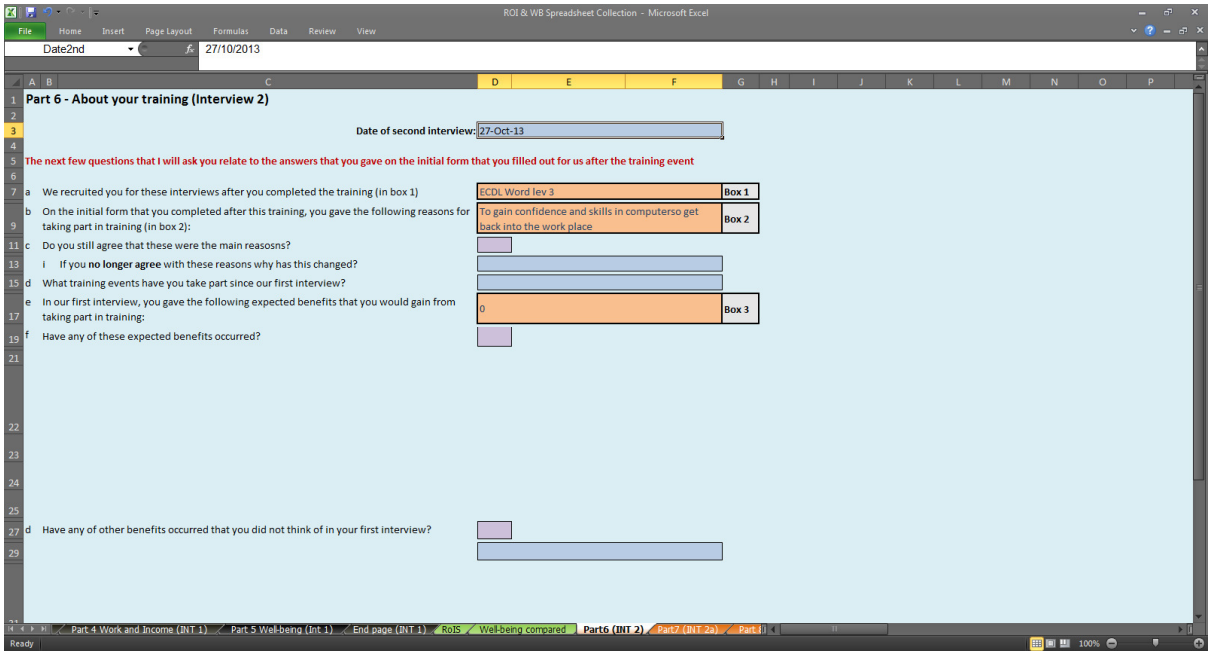
Screenshot of Part 5 – There are 30 questions on this sheet that enables the calculation of the IoSB for the first interview. Questions are separated in to four sections – general well-being, attitude, social networks and trust and belonging. Questions on well-being and work were asked in part 4 of the data collection tool. This screenshot also illustrates that many cells only allow specific values. An error message will occur if the rule is violated.



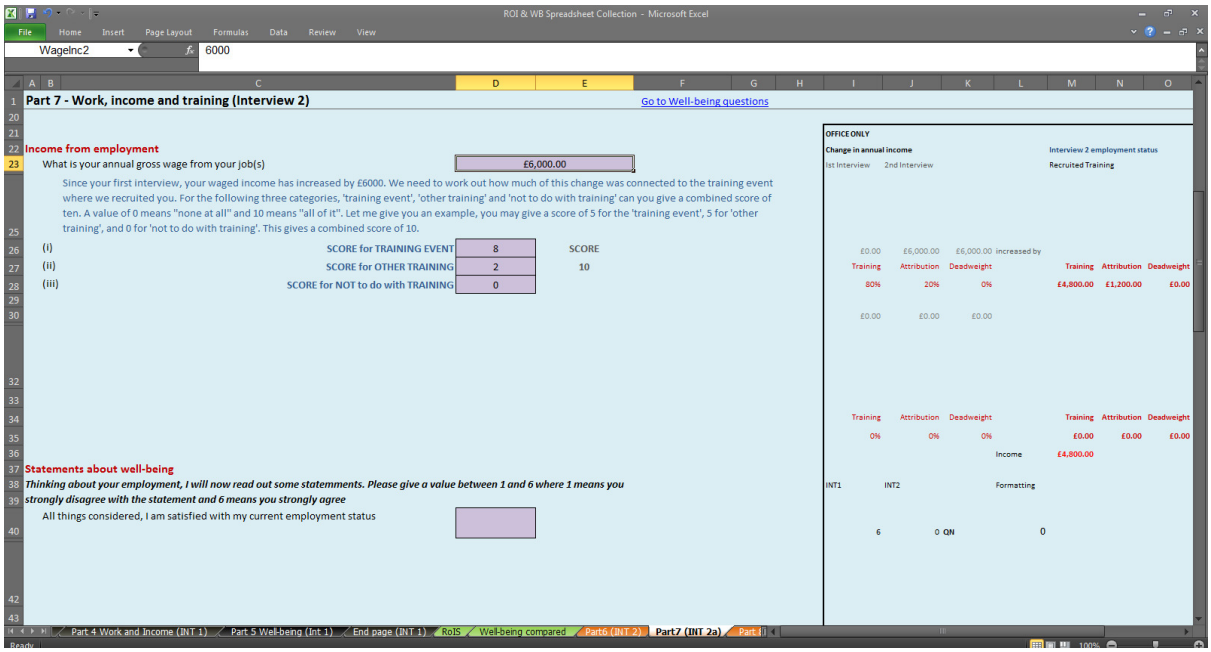
Screenshot of End of first interview – the sheet allows the user to go back to previous pages or continue on to the second interview stage.



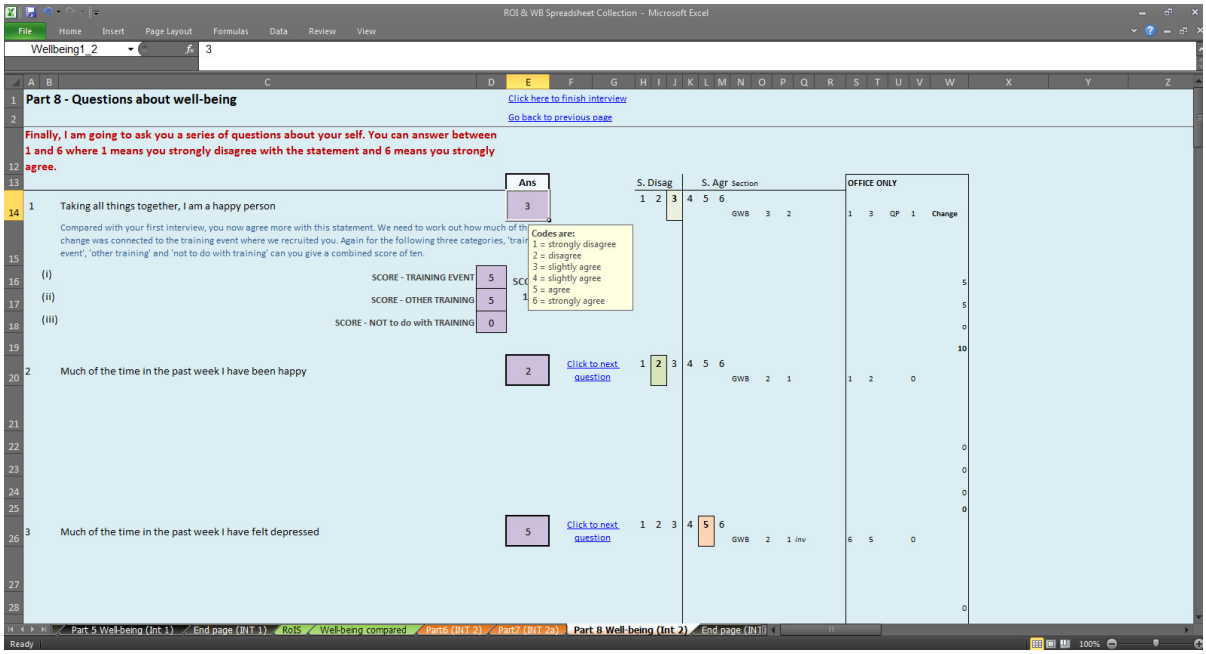
Screenshot of Part 6 – This is the beginning screen of the second interview. It establishes whether any changes have occurred between interviews.



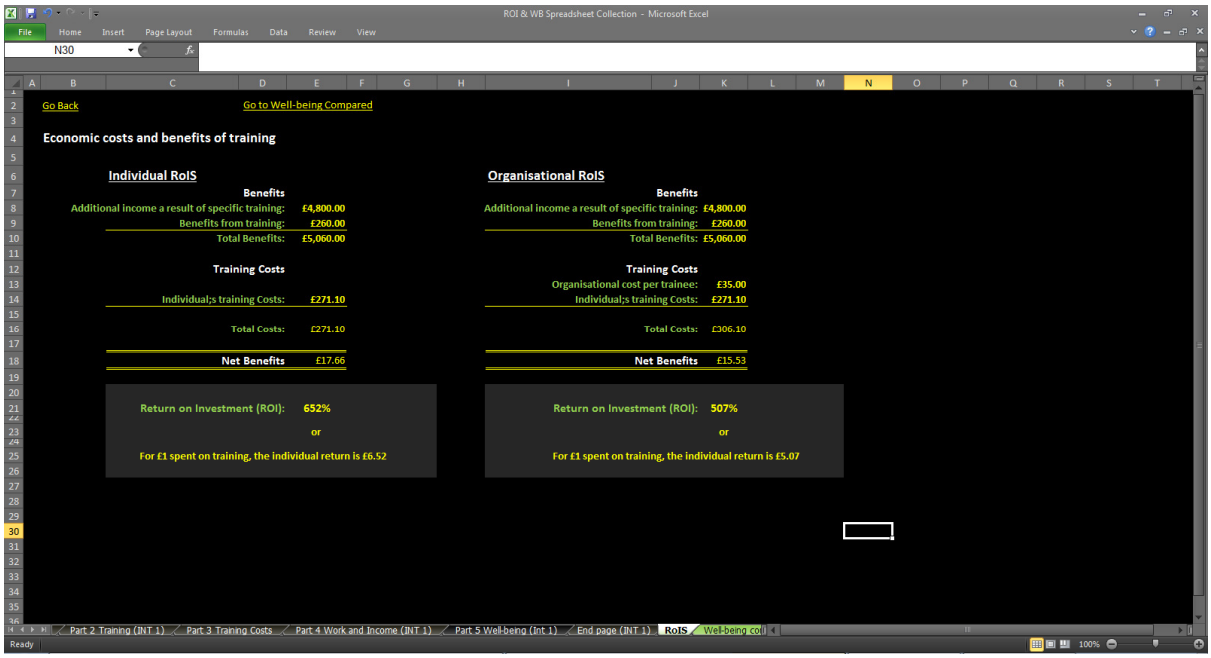
Screenshot of Part 7 – This repeats questions in part 4 (interview 1) to establish any changes in employment and income. Unlike part 4 this includes the calculations of the changes.



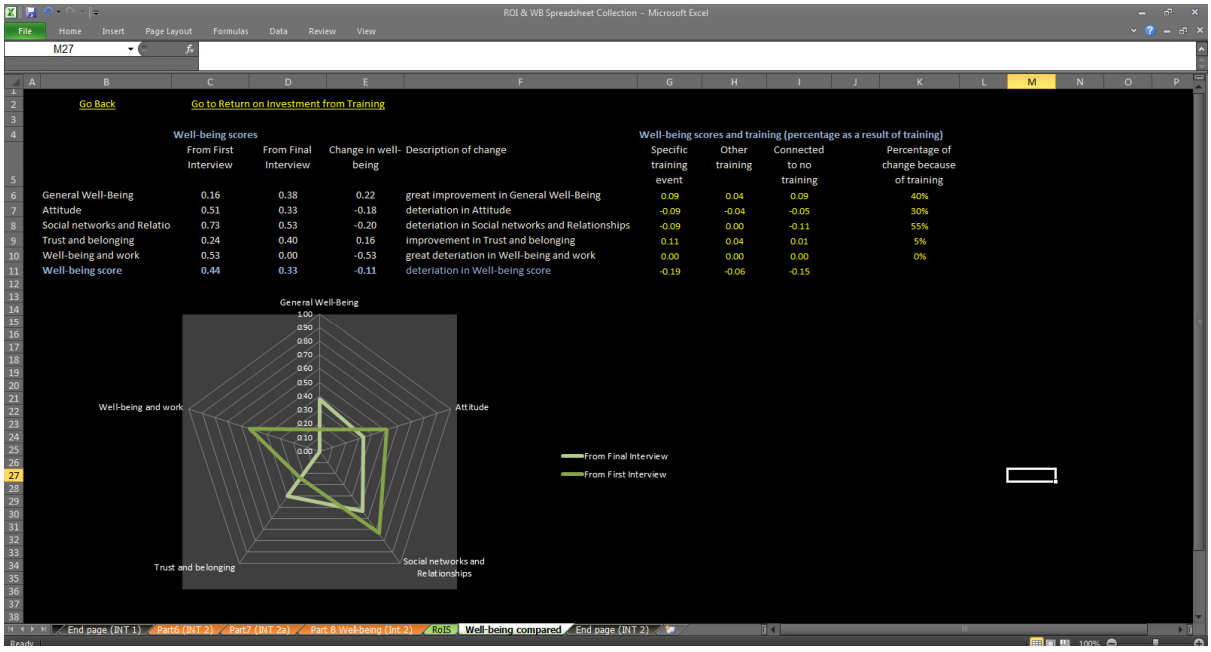
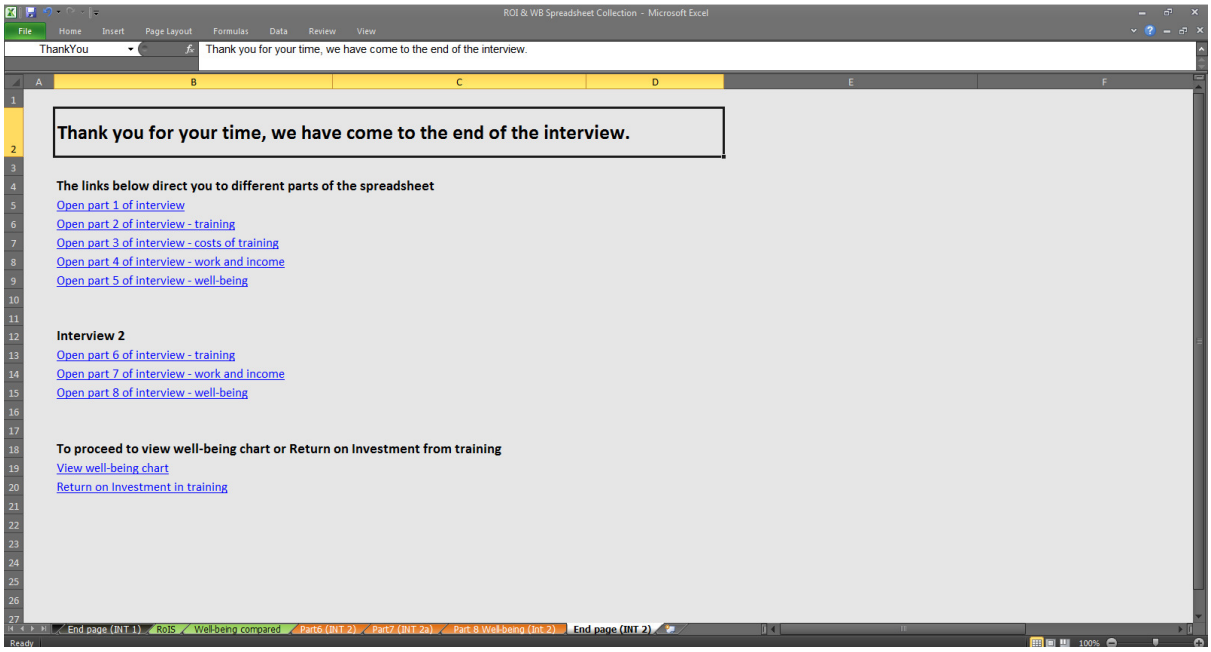
Screenshot of Part 8 – This is the final part of the questionnaire. In this sheet, the same questions that were asked in part 5 (interview 1) are repeated. Any difference (of two or more) is flagged up and additional questions about how much the training event contributed are asked. This is illustrated in the screenshot.



Screenshot of RoIS – Return on Investment from Skills Training is recorded on this screenshot. This calculates the interviewees RoIS (which does not include the organisational cost of training) and the organisational RoIS (which includes the organisational cost of training).



Screenshot of IoSB results – this gives the IoSB scores for both interviews and illustrates these in the spider graph. The score change and percentage of change as a result of training is also given.



Screenshot of Final Page