

## CLLD in Sunderland: Evaluation and monitoring plan (UPDATED SEPTEMBER 2017)

### 1. Programme-level monitoring and evaluation

Evaluation and monitoring are a crucial part of the approach to Community led local development. The Local Action Group (LAG), working with the Accountable Body, needs to consider its preferred approach to monitoring and evaluation in order to capture: (1) the 'core' ESF and ERDF outputs included in the Funding Agreements with DWP and DCLG; and (2) wider impacts and outcomes that the programme will have on local people, communities, businesses and the environment.

The **intervention logic**, included in the Local Development Strategy, is a good starting point for monitoring and evaluating the direct and indirect impacts of CLLD.

Summary of the intervention logic			
Local needs / opportunities	Local objectives / targets	Proposed actions	Performance indicators for monitoring progress and evaluating success
<b>Strategic objective 1: Enhancing employment and skills provision (ESF)</b>			<b>39.6% LDS indicative allocation</b>
<ul style="list-style-type: none"> <li>Jobs / Skills Mismatch and disconnection between areas of need and opportunity</li> <li>Distance from the labour market and widening employment prospects for particular disadvantaged groups</li> <li>High proportion of unskilled adults with no qualifications</li> </ul>	<ul style="list-style-type: none"> <li>Acquiring the right skills to ensure the CLLD target groups are able to access new jobs and opportunities</li> <li>Enabling those furthest away from the local labour market to get closer to and into work, and those in work to be more productive and progress their careers</li> <li>Improved knowledge of local provision, sign-posting and joint delivery</li> </ul>	<ul style="list-style-type: none"> <li>Training activities and skills options that match local residents with employment opportunities</li> <li>Pathways to employment initiatives and in-work progression</li> <li>More targeted local interventions for those missing out on support</li> </ul>	<ul style="list-style-type: none"> <li>Positive progression towards employment, training, volunteering or other outcome</li> <li>Improvements in participation levels and local employment rates</li> <li>Improved coordination of employment and skills provision</li> </ul>
<b>Strategic objective 2: Boosting enterprise and entrepreneurship (ERDF)</b>			<b>25.85% LDS indicative allocation</b>

<ul style="list-style-type: none"> <li>• Low levels of enterprise awareness and formation</li> <li>• Too many barriers to entrepreneurship</li> </ul>	<ul style="list-style-type: none"> <li>• Improving the enterprise culture and local infrastructure with higher numbers of entrepreneurs, SME start-ups, survivals and expansions</li> <li>• Improved economic performance</li> </ul>	<ul style="list-style-type: none"> <li>• Enterprise awareness and coaching activities to stimulate interest</li> <li>• Activities to convert business ideas and skills into new enterprises</li> </ul>	<ul style="list-style-type: none"> <li>• Increase in start-ups and progression towards enterprise</li> <li>• Improved awareness of enterprise infrastructure</li> </ul>
<b>Strategic objective 3: Improving community capacity, partnership working and social innovation (ESF)</b>			<b>24.2% LDS indicative allocation</b>
<ul style="list-style-type: none"> <li>• Low levels of social capital and community engagement</li> <li>• Low success rate / take-up of funds / resources for community development projects</li> </ul>	<ul style="list-style-type: none"> <li>• Stronger community infrastructure and capacity-building support</li> <li>• More resources / funding mobilised to invest in local people and assets</li> <li>• Greater community participation, engagement, cohesion and social inclusion</li> </ul>	<ul style="list-style-type: none"> <li>• Social capacity-building actions, leadership and volunteering support</li> <li>• Mentoring, collaboration and community development actions</li> <li>• Social investment support</li> </ul>	<ul style="list-style-type: none"> <li>• Improved sustainability and resilience of VCSE sector</li> <li>• Increased collaboration on joint projects</li> <li>• Shared learning and knowledge transfer</li> <li>• Better connected communities</li> </ul>

The Local Development Strategy includes an indicative budget of £25,000 to carry out programme-level evaluation work. In addition, as part of the programme call, projects of a certain scale (e.g. above £50,000 or £100,000) or type will be encouraged to include a separate budget for evaluation work. Guidance on how projects will be required to monitor outputs and results will be available when the call for projects is launched. Further guidance and support on evaluation will be provided to projects at the full application and contracting stages.

The action plan below sets out the options/methods available to the LAG, including any contractual requirements such as the Summative assessment process for ERDF. In order to agree the best method or combination of methods for CLLD it is recommended that a Monitoring and evaluation sub-group is set up on a bi-monthly basis to: (1) oversee CLLD monitoring and performance issues; (2) take forward the LAG's preferred approach on evaluation, including the requirements for summative assessment (ERDF only).

## 2. Action plan

Options	What does it involve?	When	How much
Appoint an	This would involve the LAG / sub-group drafting a specification setting out its	Jan 18-Jun	

<p>external evaluator to oversee all programme evaluation work</p>	<p>requirements over the course of the CLLD programme. This could include an annual evaluation, interim (in 2019/20) and/or final evaluation (in 2022).</p> <p>The content of an interim/final programme evaluation is likely to cover the following as a minimum requirement:</p> <ul style="list-style-type: none"> <li>• Context – What was the programme designed to do?</li> <li>• Vision and strategic objectives – What were the original aims and are they still relevant?</li> <li>• Achievements/Benefits – Has the strategy achieved the outputs/results and what systems are in place to monitor these over time?</li> <li>• Constraints – Did the strategy change during its implementation and what barriers did it face?</li> <li>• Value for Money – What has been achieved for the expenditure and how does this compare with comparative programmes and projects?</li> <li>• Process and systems – Could the project management and governance systems have been more effective?</li> <li>• Added Value – Have there been unforeseen impacts – either positive or negative? Were there unexpected benefits?</li> <li>• Sustainability – Are the outcomes/impacts sustainable? Are spin-offs/additional developments anticipated?</li> <li>• What are the recommendations for future development &amp; what lessons need to be learnt?</li> </ul>	<p>2022</p>	
<p>Appoint an evaluator to undertake a Social Return on Investment (SROI)</p>	<p>The Social Return on Investment methodology follows a set of principles and involves consultation with all stakeholders who may experience changes or benefits as a result of a project, programme or service. Financial values (financial proxies) are applied to the outcomes experienced, and when using financial equivalents to value the outcomes, a Social Return on Investment ratio is generated. For example, £3.50:1 would show that for every £1 invested, the project generates social value worth £3.50. It is almost purely stakeholder informed and requires a significant amount of stakeholder (including</p>		

	beneficiary) involvement. Applying the SROI principles helps you to understand, manage and communicate the social value that your work creates in a clear and consistent way. <a href="http://www.socialvalueuk.org/">http://www.socialvalueuk.org/</a>		
Appoint an evaluator to conduct a Social Accounting and Audit (SAA)	Social accounting and audit is about assessing the social value generated by an organisation. Social Accounting and Audit (SAA) helps to prove, improve and account for the difference a project or programme is making. Social accounting and audit is a logical and flexible framework which enables an organisation to build on existing documentation and reporting systems and develop a process to account fully for and report on your organisation's social, environmental and economic performance and impact, provide the information essential for planning future actions and improving performance, and be accountable to all those you work with and work for. <a href="http://www.socialauditnetwork.org.uk/">http://www.socialauditnetwork.org.uk/</a>		
Summative assessment ( <b>ERDF requirement only - see guidance</b> )	<p>A summative assessment should in the main be undertaken by evaluators who are independent of the project and who have appropriate evaluation expertise. The summative assessment is broken down into 3 stages: (1) Planning; (2) Data collection and reporting; (3) Final report.</p> <p>Summative assessment plan headings include:</p> <ul style="list-style-type: none"> <li>• Statement of objectives, scope and research questions;</li> <li>• The project logic model (which sets out the intervention logic for the project, including the range of outputs, outcomes and impacts that it intends to achieve);</li> <li>• Approach, methods and tasks;</li> <li>• Data and monitoring;</li> <li>• Implementation plan; and</li> <li>• Using and disseminating the findings.</li> </ul> <p>The data / information requirement may extend beyond spend and output information that is reported as part of the project claims. It includes:</p> <ul style="list-style-type: none"> <li>• The data and information that is collected on any additional output indicators that</li> </ul>	Final reports should be assessment 3 months before submission of the final claim (Dec 2022).	

	<p>have been specified in developing the logic models; and</p> <ul style="list-style-type: none"> <li>• The information about direct, and in some cases indirect, beneficiaries of projects.</li> </ul> <p>Summative assessment final report headings include:</p> <ul style="list-style-type: none"> <li>• Context;</li> <li>• Progress;</li> <li>• Delivery and Management;</li> <li>• Outcomes and Impact;</li> <li>• Value for Money; and</li> <li>• Conclusions and Lessons Learnt.</li> </ul>		
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### 3. Project-level monitoring and evaluation

This section sets out:

- The outputs, results and other Performance Indicators that will be used to monitor the impact of individual CLLD projects;
- How the monitoring data will be collected, analysed and reported;
- How and when the Local Action Group will monitor and review performance.

Successful projects will be required to participate in project and programme level evaluations as required by the Local Action Group. As well as collecting core ESF or ERDF outputs, project applicants and delivery partners will be required to monitor individual beneficiary progress using an agreed Outcomes Star / Wheel approach. This will be complemented by a standard CLLD beneficiary form to capture relevant information and data that will be used to capture the wider impacts of the programme.

The framework for monitoring ‘core’ and other performance indicators is set out below.

Performance indicators (ESF/ERDF/Local Development Strategy)	Objective & Action	Source of information / evidence	How collected & reported	Monitoring & review frequency
<b>Outputs/Results (ESF)</b>				
Number of participants that are unemployed, including long-term unemployed (CO01)	Objective 1 Objective 3	<p>Evidence of unemployment.</p> <p>Unemployed are persons usually without work, available for work and actively seeking work. Persons considered as registered unemployed according to national definitions are always included here even if they do not fulfil all three of these criteria.</p> <p>The definition of long-term unemployed varies with age:</p> <ul style="list-style-type: none"> <li>Youth long-term unemployed (&lt;25 years of age) = more than 6 months continuous spell of unemployment</li> <li>Adult long-term unemployed (25 years of age or more) = more than 12 months continuous spell of unemployment</li> </ul>	<p>The collection of this information will be part of the claims process. A copy of the output evidence will need to be attached to the claim before payment is made.</p> <p>The quarterly monitoring return (App 10.14) requests the following information:</p> <ul style="list-style-type: none"> <li>Description of activity</li> <li>Postcode</li> <li>Description of evidence</li> <li>Date achieved</li> <li>Beneficiary reference</li> <li>Equality information</li> </ul>	<p>Projects will receive an audit on project completion where the output information will be checked and document retention procedures noted.</p> <p>For information security purposes, beneficiary names will not be provided during the quarterly claims however references will be checked during monitoring visits.</p>
Number of participants that are inactive (CO03)	Objective 1 Objective 3	<p>Evidence of inactivity.</p> <p>"Inactive" are persons currently not part of the labour force (in the sense that they are not employed or unemployed according to the definitions provided).</p> <p>The Department for Work and Pensions consider persons who fall into the following groups as being 'inactive':</p> <ul style="list-style-type: none"> <li>Full time students (even if registered unemployed)</li> <li>Employment Support Allowance (ESA), Incapacity Benefit (IB) and Income Support (IS) claimants;</li> <li>Universal Credit claimants who are placed in: the Work Preparation Requirement or Work</li> </ul>		

		<p>Focused Interview Requirement conditionality groups;</p> <ul style="list-style-type: none"> <li>• People not in receipt of benefits</li> <li>• People who are distant from the labour market that need additional support, skills and/or confidence to enable them to move towards employment.</li> </ul>		
Number of participants over 50 years of age (O4)	Objective 1 Objective 3	<p>Signed record from individual with completed questionnaire stating age.</p> <p>The age of the participant is calculated from the date of birth and determined on the date of entering the ESF operation.</p>		
Number of participants from ethnic minorities (O5)	Objective 1 Objective 3	<p>Signed record from individual with completed questionnaire stating ethnic background.</p> <p>The ESF Managing Authority has agreed with the European Commission that in line with the guidance the England ESF programme will use the national definition of 'ethnic minority group' in-line with guidance from the Office for National Statistics.</p>		
Number of participants with disabilities (CO16)	Objective 1 Objective 3	<p>Signed record from individual with completed questionnaire stating disability.</p> <p>Disability: The main national definition is as defined in the Equality Act 2010. See link.  <a href="https://www.gov.uk/definition-of-disability-under-equality-act-2010">https://www.gov.uk/definition-of-disability-under-equality-act-2010</a>.</p> <p>You're disabled under the Equality Act 2010 if you have a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on your ability to do normal daily activities.</p> <ul style="list-style-type: none"> <li>• 'substantial' is more than minor or trivial - e.g. it takes much longer than it usually would to complete a daily task like getting dressed</li> <li>• 'long-term' means 12 months or more – e.g. a</li> </ul>		

		breathing condition that develops as a result of a lung infection		
Number of participants in education or training on leaving (CR02)	Objective 1, Objective 3	Letter from education or training provider confirming participation. Persons who have received ESF support and who are newly engaged in education (lifelong learning, formal education) or training activities (off-the-job/in-the-job training, vocational training, etc.) immediately upon leaving the ESF operation. "upon leaving" is to be understood as up to four weeks after the exit date of the participant.	The collection of this information will be part of the claims process. A copy of the output evidence will need to be attached to the claim before payment is made. The quarterly monitoring return (App 10.14) requests the following information: <ul style="list-style-type: none"> <li>• Description of activity</li> <li>• Postcode</li> <li>• Description of evidence</li> <li>• Date achieved</li> <li>• Company number</li> <li>• Beneficiary reference</li> </ul>	Projects will receive an audit on project completion where the output information will be checked and document retention procedures noted. For information security purposes, beneficiary names will not be provided during the quarterly claims however references will be checked during monitoring visits.
Number of unemployed participants in employment, including self-employment on leaving (R1)	Objective 1, Objective 3	Letter from employer confirming position in organisation or confirmation of self-employment using the company registration number. Unemployed or inactive persons who have received ESF support and who are in employment, including self-employment, six months after leaving the ESF operation.		
Number of inactive participants into employment or job search on leaving (R2)	Objective 1, Objective 3	Letter from employer confirming position in organisation, or confirmation of self-employment using the company registration number, or letter from job search provider. Inactive persons who have received ESF support and who are newly engaged in job searching activities upon leaving the ESF operation.		
<b>Outputs/Results (ERDF)</b>				
<b>Number of enterprises that will receive support (ER/C/O/01)</b>	Objective 2	Record of Business - Name, address including post code, contact details, company registration number (CRNs) if applicable. Support claimed through hours supported (minimum	The collection of this information will be part of the claims process. A copy of the output evidence will need to be attached to the claim.	Projects will receive an audit on project completion



<p>The type of support includes consultancy, information, diagnostic advice and guidance to individual businesses, as well as financial assistance for investment that results in the production of goods and/or services.</p>		<p>12 hours) – record, electronic or paper, of support over the minimum threshold verified and signed by a senior member of staff in the enterprise assisted, including time period claimed.</p> <p>Support claimed for direct financial support - copy of a signed loan agreement signed grant funding agreement or other risk finance investment documentation demonstrating that value over minimum threshold has been provided to the business, with a unique identifier.</p>	<p>The quarterly monitoring return (App 10.14) requests the following information:</p> <ul style="list-style-type: none"> <li>• Description of activity</li> <li>• Postcode</li> <li>• Description of evidence</li> <li>• Date achieved</li> <li>• Company number</li> <li>• Beneficiary reference</li> </ul>	<p>where the output information will be checked and document retention procedures noted. For information security purposes, beneficiary names will not be provided during the quarterly claims however references will be checked during monitoring visits.</p>
<p><b>Number of new enterprises that will receive support (ER/C/O/05)</b></p> <p>This is a subset of indicator C1 – therefore Count Criteria under C1 must be fulfilled.</p> <p>Activity must be to support a new business, or a business locating in the Programme area for the first time, to start trading.</p>	<p>Objective 2</p>	<p>In addition to the evidence required for the above indicator:</p> <p>Evidence of a new business – the company incorporation statement or letter or standard form to collect the data signed by a senior officer of the business e.g. the Owner/Chief Executive Officer.</p>		
<p><b>Employment increase in supported enterprises (ER/C/O/08)</b></p> <p>A new, permanent, paid, full-time equivalent (FTE) job created as a result of activity supported by project.</p>	<p>Objective 2</p>	<p>Job Created: written confirmation from senior member of staff in the supported enterprise, confirming the creation of a post within the English programme area as a result of the support provided. This should include details of the job as advertised and started, duration, and the number of hours per week.</p> <p>A sole trader will need to provide a self-declaration to confirm details of post started, salary, duration and number of hours per week.</p>		

<p><b>Number of potential entrepreneurs assisted to be enterprise ready (ER/P/O/11)</b></p> <p>Assistance must be focussed and reported on the following target groups:</p> <ul style="list-style-type: none"> <li>• individuals aged 16 and over currently in employment, unemployed or economically inactive with an interest in exploring alternative career pathways</li> <li>• Pre-start support provided to a potential entrepreneur may be recorded as eligible activity. This applies to entrepreneurs who are not trading and have not been registered with Companies House or HMRC before assistance is provided.</li> </ul>	<p>Objective 2</p>	<p>Individual: Name, date of birth, address, postcode.</p> <p>Data protection: By completing the monitoring returns, programmes agree to the data they provide the Managing Authority being used to collate reports on national and regional ERDF activity for publication. In accordance with Data Protection regulations, any data on individuals will not be shared with anyone else without the expressed permission of the project in question.</p> <p>Activity: Letter or standard form signed and dated by the individual specifying what assistance they received and on what date(s).</p>		
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<b>LDS Performance Indicators</b>				
Number of projects supported (ESF) including those led by VCSE organisations	Objective 1 Objective 3	Funding agreement between Accountable Body and Project.	Accountable Body will be responsible for keeping a copy of the contract.	This will be confirmed when the funding agreement is in place.
Number of participants (ESF)	Objective 1 Objective 3	Record of Individual - Name, address incl postcode, contact details. Participants' signature will be required on the record.	The collection of this information will be part of the claims process. A copy of the output evidence will need to be attached to the claim before payment is made.	Projects will receive an audit on project completion where the output information will be checked and document retention procedures noted.
Number of projects supported (ERDF)	Objective 2	Funding agreement between Accountable Body and Project.	Accountable Body will be responsible for keeping a copy of the contract.	This will be confirmed when the funding agreement is in place.
Number of jobs created in supported enterprises (ERDF)	Objective 2	Job Created: written confirmation from senior member of staff in the supported enterprise, confirming the creation of a post within the English programme area as a result of the support provided. This should include details of the job as advertised and started, duration, and the number of hours per week. A sole trader will need to provide a self-declaration to confirm details of post started, salary, duration and	The collection of this information will be part of the claims process. A copy of the output evidence will need to be attached to the claim before payment is made.	Projects will receive an audit on project completion where the output information will be checked and document

		number of hours per week.		retention procedures noted.
Number of new social investment / enterprise projects developed (ERDF)	Objective 2	Project activity records will provide the name and address of the new social investment / enterprise project. This record will be signed by the person responsible for the new project.		
Positive progression towards employment, training, volunteering or other outcome (ESF)	Objective 1	Number of people moving into employment, training, volunteering or other will be captured as part of the output and results information above, however progression towards will be captured through project activity records and follow up with project participants.		
Improved awareness of enterprise infrastructure (ERDF)	Objective 2	Follow up forms will be developed in order to assess if partners and participants feel they have a better understanding of enterprise infrastructure.		
Increased collaboration on joint projects (ESF and ERDF)	Objectives 1, 2, 3	During application process and implementation, projects will be asked to show how they intend to work together and what partners/organisations they are engaging and what each of their roles will be.		
Shared learning and knowledge transfer (ESF and ERDF)	Objective 1, 2, 3	During application process and implementation projects will be asked how they will share their learning and knowledge with other voluntary/community organisations across the CLLD area and the wider community.	Publicity/media/website information, consultations and workshop, mentoring and volunteering opportunities.	Quarterly
Improved skills, capacity and local leadership to meet local needs (ESF)	Objective 3	Projects will be required to provide information on accredited and non-accredited training delivered and qualifications obtained.	Output/outcome reporting mechanisms of projects supported.	Quarterly
CLLD target communities better connected and able to take advantage of wider opportunities (ESF and ERDF)	Objective 1, 2	Monitoring and evaluation of ESF and ERDF interventions that lead to employment or enterprise outcomes among target groups resident in the most deprived 20% LSOAs.	Will be collected as part of client monitoring process.	Quarterly reports. Interim and final evaluation.

Business Survival rates at 6, 12, 18 and 24 months (ERDF)	Objective 2	Client monitoring process and follow-up evaluation work.	Will be collected as part of client monitoring process.	Six-monthly, Interim and final evaluation.
Difference in household income pre and post start-up (ESF/ERDF)	Objective 2	Client monitoring process and follow-up evaluation work.	Will be collected as part of client monitoring process.	Annually. Interim and final evaluation.

#### 4. Additional information / data collection

Who is involved	What is collected		How is it collected	How will it be used
All participants – how is this programme working locally – groups will need to also collate information on their community needs	Demographic Information	Family status Housing Tenure Length of unemployment 6,12,18, 24, 36 plus Education / training Benchmark Benefits claimed Date of birth (age) Disposable income before HC	Via registration forms	Compile trend data to identify gaps and potential opportunities for campaigning  Outputs achieved (3) Value for Money (5)  <b>*Provide a data set for Social Accounting should this be required</b>
	Wellbeing Information	<u>Insert</u> benchmark criteria  Outcome star User Survey Focus Group	Conducted outside of paperwork sessions at intervals - Suggestion - Close to registration as possible and then at exit. N.B. Will need to discuss how participants not claimed as an output are also involved in this.	To measure the distance travelled in relation to a variety of soft outcomes – these may include ..... Confidence/self-esteem, reduced isolation, positive functioning, emotional wellbeing ( <a href="http://www.nationalaccountsofwellbeing.org/public-data/files/national-accounts-of-well-being-report.pdf">http://www.nationalaccountsofwellbeing.org/public-data/files/national-accounts-of-well-being-report.pdf</a> page 21)

Those who are claimed as an output	Destination Data	Insert criteria here ... F/t P/T, Temp, wage level, Churn rate, better off calculation, Business start-up, turnover, structure, employees,	Exit paperwork	To prove the Achievement/Benefits (3) Value for Money (5) Obtaining this data will provide an insight into the social value created (HACT <a href="http://www.hact.org.uk/measuring-social-impact-community-investment-guide-using-wellbeing-valuation-approach">http://www.hact.org.uk/measuring-social-impact-community-investment-guide-using-wellbeing-valuation-approach</a> ) and the economic impact. <b>*Provide a data set for Social Accounting should this be required</b>
	Ongoing Monitoring	Via monitoring forms i.e. still employment, type of employment, additional support required, turnover, employees, business outlook Suggest 6, 12, 18 & 24 month intervals	This may need to be coordinated centrally but collected at project level	Success rates/Sustainability (8). Potential trends into reasons why the employment ends providing opportunities for improvement. <b>*Provide a data set for Social Accounting should this be required</b>
Those who do not reach an output	Drop out data	Why left? Family, not confident, disillusioned, kids, qualification, market trends, reason for drop out etc.	Focus Groups followed up by survey. This may be a sample size of people.	Added Value (7) Constraints (4). From this, unintended (positive and negative) outcomes may be discovered, this data will provide opportunities for developing the project. <b>*Provide a data set for Social Accounting should this be required</b>
<b>Partners to identify participants who may be interested in taking part in ongoing focus groups (possibly incentivised) as detailed in plan below</b>				
<b>Who takes part</b>	<b>When</b>	<b>User profile</b>	<b>How will it be used</b>	
Participants – focus group representing all partners involved	6, 12, 18, 24 months	lone parent/carers, young people, LTU, women	To test the vision and strategic objectives (1,2) Lesson to be learned (9) Outcomes (7,8) ** Should an SROI to be required outcome testing to be carried out. It is important the outcomes valued are those which have been identified by the participant. Depending on the outcome for this the outcome/wellbeing measures may change.	

in delivery			
Partners	6, 12, 24 months		To test the vision and strategic objectives (1,2) Governance/project management (6) Constraints (4) *Provide a data set for Social Accounting should this be required

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## 5. Building on good practice and lessons learned

In developing the strategy the LAG has also been keen to draw on good practice from other projects and community economic development approaches, including the URBAN II Community Initiative (for Hetton and Murton), Objective 2 Priority 4 (Targeted Communities), Future Jobs Fund, the Working Neighbourhoods Fund and Leader.

The Leader programme was reported as being a successful delivery model for managing and delivering local interventions (A Review of the Leader Approach for Delivering the Rural Development Programme for England, Lincoln Business School, 2013). Specific recommendations included:

- Promoting social inclusion, poverty reduction and economic development as one of the most important priorities, followed by resource efficiency and the shift towards a low carbon economy;
- Setting good practice guidelines in terms of LAG member recruitment, conduct of meetings, the bid development process, contracting and monitoring;
- Reinforcing the benefits of networking and cooperation projects, and setting informal targets for the number and scale of collaboration projects;
- Developing a formal method of measuring the economic, social and environmental impacts of LAGs, such as recognising match funding and wider returns on investment.

The LDS also draws on good practice from the 'Community Economic Development' (CED) programme's approach, and the focus on bottom-up engagement, making best use of local resources (including those within the environment, labour market, existing infrastructure) and delivering economic, environmental and social outcomes which benefit the residents of the target area. Using co-production principles, considerable effort has been made to ensure that all community stakeholders – including local businesses, community groups, residents and client groups, VCSE and public sector – have had an opportunity to feed in comments and ideas to inform the strategy and prioritisation of actions. The LAG recognises that it will be equally important to ensure that during the delivery phase all stakeholders continue to feel part of the LDS and are equipped with the tools to help shape, contribute to, and benefit from, its actions.

The strategy will aim to avoid the failures of some regional and local economic strategies, which are often a result of one or more of the following issues:

- the pursuit of growth in sectors which do not, in fact, benefit large sections of the existing population of an area;



- the failure to connect new and developing sectors of the economy with existing local economies or communities;
- basing economic priorities on labour, infrastructure or environmental resource needs which do not yet exist in the local economy, rather than on the existing asset base;
- missing opportunities to build strategies around the economic knowledge and motivations of small and medium local enterprise, local community organisations, and neighbourhood level community representation structures.

During the research and workshops, there has been a strong emphasis on identifying and evidencing what works well with potential beneficiary groups. A number of case studies and evaluations have directly informed the objectives and indicative activities.

Case study	Good practice to be shared / lessons learned
Achieving Everyone's Potential (Sunderland)	Engaging with young people and those at risk of becoming NEET
Communities Action, Reflection and Change Project (Sunderland)	Engagement, informal community development learning and community action
Danish Youth Guarantee	Policy focused on young people under the age of 25 years, offering employment, continued education, apprenticeship or traineeship, within 4 months of becoming unemployed or leaving formal education
Enterprise Coaching (Sunderland, South Tyneside)	Enterprise coaching to disadvantaged individuals from under-represented groups facing significant barriers to enterprise
Future Jobs Fund (Sunderland / Tyne and Wear)	Employer engagement, performance on progression into work and post-employment support
Work and Learning Service (Sunderland)	Employability support to unemployed Gentoos or those living within a Gentoos property in order to move them closer to the jobs market
Inspired Support	New model of support for people with autism spectrum conditions and learning disabilities, offering a personalised, tailored approach and support for varying periods of time dependent on need
Job Angels (Sunderland)	A job placement business model incubating long-term unemployed people into work through a highly personalised designed pathway of training
Job Linkage – Sunderland	Area-based employability support to workless residents
Local Response Fund (Sunderland)	Sector specific skills support for the workforce pilot
Open Doors (Scotland)	Engagement with young people with disabilities and employers
Project Choice	Engagement and support for young people with learning disabilities, difficulties and/or Autism into employment

Strengthening Families programme (Sunderland)	Information sharing, new software tools, holistic 'whole family' package of support, multi-agency working
Sustainable Enterprise Strategies (Sunderland)	Community enterprise coaching for underrepresented groups
Working Capital Pilot (London)	Community and client engagement / outreach,
Working Neighbourhoods Fund (Sunderland)	Employability pilots, Enterprise coaching

Feedback and evidence gathered to date has placed a strong emphasis on the quality of engagement and support offered by delivery partners in achieving positive labour market progress for individuals. A number of themes and elements of good practice have emerged from the workshop discussions, including the need to:

- Deliver projects in an environment that is familiar to/comfortable for the participant and in a non-pressurised way;
- Undertake activities and support in very small groups or on an intensive one-to-one basis;
- Tailor the amount and content of support to the needs of each participant;
- Allow participants the time and flexibility to progress at their own pace;
- Adopt an incremental, long-term approach towards labour market progression.

Where this good practice has been robustly evidenced, the LAG will seek to promote interventions that have worked well with particular target groups. These might include:

- **Targeted interventions** at particular at-risk groups, such as older, younger or disabled people, as this is seen as more effective than schemes targeted at specific geographical areas;
- Adopting a **flexible** approach to deal with additional obstacles to labour market participation such as housing, domestic violence, debt, transport, and drug and alcohol dependency;
- **Person-centred** support to the client during the learning journey from engagement into employment or enterprise, including post-employment and additional business support;
- **Longer-term solutions** – CLLD will be able to provide longer-term support, especially for those furthest from the labour market;
- **Evaluation and performance management** – good evidence and consistent tracking will be key principles that CLLD will adopt;
- **Collaboration** – partnership-working will be a key feature of CLLD, including joining up engagement and referral processes and establishing data sharing protocols.