

FOR INFORMATION



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# Integrated Employment and Skills

## Waiting times for the nextstep service

February 2010

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[www.lsc.gov.uk](http://www.lsc.gov.uk)

Learning and Skills Council

**National Office**

Cheylesmore House

Quinton Road

Coventry CV1 2WT

T 0845 019 4170

F 024 7682 3675

[www.lsc.gov.uk](http://www.lsc.gov.uk)

For further details please contact:

**Rosie Gloster**

*Senior Researcher*

**Inclusion**

3rd Floor, 89 Albert Embankment

London

SE1 7TP

Tel: 020 7840 8342

Email: [rosie.gloster@cesi.org.uk](mailto:rosie.gloster@cesi.org.uk)

The responsibility for the contents of the report rests with the authors

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## Summary

The first Integrated Employment and Skills (IES) trial was implemented in the West Midlands region in September 2008. The rollout expanded in February/March 2009 to include areas in the East of England, the North West, South East and London. As part of the trials Jobseeker's Allowance claimants can be referred to **nextstep** for a skills health check at their new claims interview, their 13 week or 26 week review meetings. During implementation it became clear that there were variations in the length of time customers were waiting for an appointment with **nextstep**. The main aim of this research is to look at these variations in waiting times and analyse the reasons behind them. Management information was analysed and qualitative interviews with stakeholders were undertaken in the West Midlands, Cambridgeshire, Suffolk and Norfolk and Hampshire and the Isle of Wight.

### Provision commissioned through an extension to the nextstep contract

The IES provision delivered by **nextstep** was commissioned through a separate schedule in the main **nextstep** contracts that were put in place last August. This meant that the Prime Contractors had to deal with a new element of provision, alongside putting measures in place to deal with new contracting and service delivery arrangements. This was a particular issue in the West Midlands which was the first region in which the trials were rolled out (within one month of the main **nextstep** contract being issued), and the only region to implement the trials across the whole region. It has also meant there are not specific targets for the IES trials, for example, in terms of waiting times. This has created difficulties in understanding and managing the performance of the IES trial.

**nextstep** contractors were delivering their IES trial work alongside the main **nextstep** contract and other advice and guidance work too, such as redundancy work. Waiting times for the IES service need to be looked at in the context of the demands placed on contractors by other contracts, as the same advisers usually deliver both IES and mainstream provision.

In addition, the client group for IES support and non-IES support was reported to be the same. Advisers, at both **nextstep** and Jobcentre, were not always clear about the differences in the level and type of service **nextstep** provide as part of the IES trials and more generally. This, combined with the paperwork required to make referrals, meant that signposting to **nextstep** can be the preference of Jobcentre Plus staff.

### Waiting times vary between and within areas, but there is a lack of robust data

Two out of the six areas in the West Midlands had waiting times that were on average longer than two weeks. For one week in July, the waiting times for the next available appointment in Hampshire varied from one to seventeen days. Ten out of the eighteen offices had the next available appointment in five working days or less.

While the available data suggest that there are variations in waiting times between and within regions, there is a lack of consistent data about the extent of waiting times for customers referred by Jobcentre Plus to the **nextstep** service as part of the IES trials. This makes it difficult to assess reliably the areas with higher and lower waiting times and to understand how they vary between regions and Jobcentre Plus offices at any one point and over time. Collecting data for each customer about the date on which they were referred and the date on which their appointment took place would

enable waiting times to be monitored, and therefore managed, on a more consistent basis.

### **Is a five day waiting time appropriate for the IES trials?**

The assumption underpinning the IES trials is that Jobcentre Plus clients referred to **nextstep** should receive the same level of service as other **nextstep** customers. This has meant an expectation that clients should wait no more than five days for an appointment. However, it may be preferable to arrange appointments to coincide with sign-on appointments and have a longer waiting time, particularly where **nextstep** advisers are co-located in Jobcentre Plus offices. In addition, should Jobcentre Plus clients referred as part of the IES trials take precedence over other **nextstep** clients, many of whom were also reported to be clients of Jobcentre Plus?

### **Adviser capacity key to reducing waiting times, but picture is complex**

**nextstep** adviser capacity was reported to be a key constraint to reducing waiting times in areas where waiting times were high. However, managing the balance between demand for and supply of the **nextstep** service for the IES trials is complicated by other factors that challenge **nextstep** to provide a responsive service as part of the IES trials, such as the funding model and attendance rates.

Nevertheless, areas with higher numbers of referrals per adviser had longer waiting times. The planning assumptions in the West Midlands show variation between the number of advisers per referral in each area. In practice this has varied from 135 to 407 referrals per adviser.

The funding model is the subject of a separate piece of research, but it is clear from the work we have done that for some sub-contractors the current model is not only limiting their ability to rent premises, but also to recruit more staff. It appears therefore to be limiting their capacity to respond to the IES trials effectively and to decrease waiting times.

Many sub-contractors reported that they had made a loss from the IES component of their contracts to date, due largely to the high failure to attend rate, so were unable to financial justify to senior managers the recruitment of additional staff. This limited adviser capacity and the flexibility of the providers to respond to demand. There appears to be a greater inclination among the subcontractors to take on non-IES work because it was seen as a more secure source of funding for two main reasons: it can lend itself to group work and the clients were reported to be more likely to attend. If IES referrals are to be prioritised in order to reduce waiting times, some sort of 'premium' may be required to make the contract viable.

### **Use of premises restricted by understanding, availability and cost**

In some areas **nextstep** fully co-located with Jobcentre Plus. In others there was partial co-location, while in a few **nextstep** were unable to co-locate at all due to a lack of space in Jobcentre Plus. Among interviewees there was some confusion about whether IES services could be delivered outside of Jobcentre Plus premises. The belief that all provision had to be co-located was restricting the increase of adviser time in some cases, although increasing adviser time to deliver the IES trials needs to be considered in the context of other contracts and commitments.

Where managers wanted to increase **nextstep** adviser time on IES, but Jobcentre Plus could not accommodate them and they did not have their own premises, the costs of hiring additional premises were reported to be prohibitive in some cases. In

others respondents said there was a lack of suitable local community venues. In addition, co-location was felt to have benefits, such as building relationships with advisers and raising the profile of the service, and interviewees did not want to lose these by working out of other venues.

There were some examples of **nextstep** using Jobcentre Plus premises to deliver services to non-IES customers, because these customers were reported to be more likely to attend appointments and therefore generate revenue, but also because of a shortage of other suitable premises in some instances.

### **Referral rates affected by recession, awareness and customer feedback**

The West Midlands has the highest unemployment claimant count rate of any English region. Referrals in this trial area have been consistently strong whereas respondents in the East and South East described fluctuating levels or a lack of referrals from Jobcentre Plus. Adviser awareness and understanding, and feedback from customers about the benefits of the service were also described as affecting referral rates. Where demand is consistently strongest, waiting times have been longest.

### **Demand and number of sub-contractors affect flexibility**

In the West Midlands there was most evidence of advisers being at or above capacity. Some data from the East region showed one week in June where **nextstep** offered 19 per cent more appointments to the IES trial than were filled.

Where waiting times were consistently high there, was no slack for advisers to be moved from one office to another in response. As the trials are being implemented across the whole of the West Midlands region it also meant that sub-contractors could not 'borrow' advisers from other areas in the region to meet peaks in demand and manage waiting times. This was reported to have been done in both the South East and East regions.

Under the Prime Contracting model the West Midlands had the lowest number of sub-contractors of any region (six). This model also seems to have affected the flexibility as there are no other sub-contractors in the same sub-region that can be brought in to assist when waiting times are high. There was evidence of this practice in the trials in Cambridgeshire, Norfolk and Suffolk and in Hampshire and the Isle of Wight.

### **Several opportunities to reduce waiting times**

There are several opportunities for **nextstep** to reduce waiting times and some of the suggestions below build on the good practice we found in the research. The first suggestions relate to **increasing the capacity and flexibility of nextstep**. Clearly, one approach could be simply to increase the number of advisers. However, for reasons outlined above, this may not always be practical. Therefore further consideration could be given to using existing advisers more flexibly. For example advisers could work over many sites and not have their diaries booked in advance, so they can be brought in at short notice where waiting times are at risk of becoming too long.

More could be done to get the most out of existing adviser time. There could be wider use of **spider bookings** to decrease the negative impact of customers who fail to attend and more use of **Saturday and/or early evening appointments** in areas where waiting times are longer than required. There were several examples of good

practice to increase attendance rates highlighted in Chapter 4. These could be built on.

Jobcentre Plus could **inform nextstep of likely peaks in 13 and 26 week reviews**, based on the on-flows to Jobseeker's Allowance. This would give **nextstep** some advanced notice of the possible peaks in referrals resulting from these review meetings so they could plan staffing levels accordingly and better manage meeting these peaks so they minimised increases in waiting times. Under current working arrangements it is difficult for **nextstep** to plan their capacity.

There was a lack of clarity about whether or not IES customers could be seen outside of Jobcentre Plus premises for their first appointment. Clarifying this might enable **nextstep** to deliver IES services from other locations, although this will be limited by premises availability.

There were specific issues for rural areas and difficulties meeting demand in areas where there were not consistently enough referrals for **nextstep** to co-locate. **Webcams or other technology** could be used in these circumstances to make best use of adviser time and minimise waiting times for these customers. For customers with sufficient internet skills, there may be scope for advisers at the Careers Advice Service to carry out Skills Health Check appointments over the phone. This would also be an extra pool of advisers, as well as ensuring the service could reach rural areas and customers in areas with lower levels of referrals most cost effectively.

## 1 Introduction

### *Structure of the report*

After setting out the report structure this chapter sets out the policy context for the Integrated Employment and Skills (IES) trials and the aims and objectives for this research. **Chapter 2** sets out the methodology. **Chapter 3** looks at the set up and management of the service, including contracting arrangements. **Chapter 4** explores delivery, including the resourcing of the trial, the number of referrals to the **nextstep** service and how contractors try to balance demand for the service with adviser time. Finally, **Chapter 5** summarises what is affecting waiting times for the **nextstep** service as part of the IES trial, sets out some examples of good practices and presents some recommendations for managing waiting times in the future.

### *The integration of employment and skills*

One of the main recommendations of the Leitch Review (HM Treasury, 2006<sup>1</sup>) was to create a new IES service based on existing structures, such as Jobcentre Plus and careers advice services, in order to promote career advancement and sustainable employment.

The government response to the Leitch Review set out ways in which this challenge could be met. The objective to better integrate employment and skills policy and delivery has continued to be developed in a series of other policy papers in England issued jointly by the then Department for Innovation, Universities and Skills and the Department for Work and Pensions. *Opportunity, Employment, Progression* (DIUS and DWP, 2007<sup>2</sup>) set out some of the challenges for integrating employment and skills, such as a seamless customer journey with the flexibility to respond to individual needs.

This was followed in January 2008 by *Ready for Work: Skilled and Work* (DIUS and DWP, 2008<sup>3</sup>) which set out that new benefit claimants would have to undergo a skills screening, and that a skills health check would be implemented by the Adult Advancement and Careers Service (aacs).

In England there are ongoing trials to test approaches via a series of IES trials. A trial across the whole of the West Midlands region started in September 2008. The rollout expanded in February/March 2009 to include areas in the East of England, the North West, South East and London. A 'core offer' has been designed for the IES trials comprising seven key components: enhanced screening processes; enhanced **nextstep** adult careers service; skills health check; improved referral processes; flexible and responsive provision; support to access employment; and skills accounts.

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<sup>1</sup> HM Treasury (2006) *Prosperity for all in the global economy: world class skills*, HM Treasury

<sup>2</sup> DIUS and DWP (2007) *Opportunity, Employment, Progression: Making skills work*, DIUS

<sup>3</sup> DIUS and DWP (2008) *Ready for Work: Skilled and Work: Unlocking Britain's Talent*, DIUS



Jobseeker's Allowance claimants can be referred to **nextstep** for a skills health check at their new claim interview and also their 13 week or 26 week review meetings. Figure 1 outlines the customer journey and how **nextstep** and careers advice services fit into the process (stage 2 of the customer journey). It is the waiting times for this aspect of the IES trials that are the subject of this research.

**Figure 1: IES services: the customer journey for benefits claimants**

*Source: DIUS, World Class Skills: Implementing the Leitch Review of Skills in England 2007, p34*

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**Research aims and objectives**

It is understood that there are differences in the length of time that customers have to wait once they are referred to stage 2 of the IES customer journey. These differences are both between and within the IES trial areas. Research was commissioned to understand why these differences exist and the factors that affect the ability of **nextstep** to provide a responsive service as part of the IES trials.

Therefore the research aims for this project are as follows:

- What are the variations in waiting times?
- How do management and delivery arrangements affect waiting times?
- How do referral systems affect waiting times?
- How does staff capacity affect waiting times?
- How does premises capacity affect waiting times?
- How does contracting and planning with Jobcentre Plus affect waiting times?
- What factors challenge the ability of **nextstep** to provide a responsive service?

## Methodology

The main component of the research involved **qualitative interviews** with a small number of national stakeholders at the Learning and Skills Council, and has focused largely on activity in three of the areas with the IES trials: the West Midlands (across the whole region), Hampshire and the Isle of Wight (in the South East) and Cambridgeshire, Norfolk and Suffolk (in the East region). This case-study based approach allowed us compare and contrast waiting times and management practices across a small number of areas.

There were 57 interviews achieved in total with the largest number (27) in the West Midlands. The breakdown of the qualitative interviews by case-study area and type of interviewee is shown in Table 2.1.

**Table 2.1: Qualitative interviews by case-study area**

Stakeholder	National	Region			Total
		W.Midlands	Eastern	South East	
<b>LSC staff</b>					
National staff	3				<b>3</b>
Regional <b>nextstep</b> contract managers		2	1	1	<b>4</b>
<b>nextstep staff</b>					
Prime contractor		2	1	1	<b>4</b>
<b>nextstep</b> advisers		13	6	2	<b>21</b>
Administrative staff		2	2	2	<b>6</b>
Contract managers		6	3	2	<b>11</b>
<b>Jobcentre Plus staff</b>					
		2	3	3	<b>8</b>
<b>TOTAL</b>	<b>3</b>	<b>27</b>	<b>16</b>	<b>11</b>	<b>57</b>

**Management information** about the IES trials is not held nationally and therefore as part of the interviews with stakeholders we asked about the management information and other **relevant documentation** they held locally and regionally. These data and documentation were reviewed and analysed to report alongside the qualitative findings. The data and documentation we collected is as follows:

### *West Midlands*

- Details of Jobcentre Plus and **nextstep** co-location by office at the outset of the trials
- Birmingham and Solihull and Black Country forensics report, June 2009
- Management information about the number of referrals and attendance rates (cumulative September 2008-July 2009)
- Jobcentre Plus IES trial management information about referrals
- Report to the Regional Implementation Board for May 2009
- Regional Implementation Board Traffic Light report, May 2009
- National specification for Prime Contractors

- Trials service specification for Prime Contractors
- Waiting times trend analysis (snapshots Nov and Dec 2008, Jan, Mar, July and Aug 2009)

*South East*

- Management information report for Hampshire in May 2009
- Adviser feedback summary, June 2009
- Waiting times for appointments as of 30<sup>th</sup> July 2009
- Next available appointment by Jobcentre Plus office, 3<sup>rd</sup> July 2009
- Summary for Regional Implementation Board, June 2009
- Referrals from Jobcentre Plus to **nextstep**

*East*

- Availability of appointments as of end of July 2009
- Referrals from Jobcentre Plus to **nextstep**

In order to get a better sense of the referral process on the ground and to observe first hand how customers were referred to **nextstep** as part of the IES trials **observations days** were arranged at two Jobcentre Plus offices: one in the South East and one in the Eastern region.

The data from all three aspects of the methodology have been analysed together and are summarised in this report. Where quotes from interviewees are used, these have been anonymised and letters allocated to each case-study area.

## Set up and management of the service

### *Chapter summary*

- A limited amount of data about waiting times was made available for this research. Waiting time data is not collected systematically. Collecting waiting time data for individual customers could allow average waiting times to be calculated and compared over time. This information would also allow contractors to monitor and manage waiting times more effectively.
- Two out of the six areas in the West Midlands had waiting times that were on average longer than two weeks. For one week in July, the waiting times for the next available appointment in Hampshire varied from one to seventeen days. Ten out of the eighteen offices had the next available appointment in five working days of less.
- The IES provision was commissioned through a separate schedule in the main **nextstep** contract for Prime Contractors. This meant that the new Prime Contractors had to deal with a new element of provision, alongside putting measures in place to deal with the new contracting and service delivery arrangements. This was a particular issue in the West Midlands which was the first to roll out.
- The assumption underpinning the IES trials is that Jobcentre Plus clients referred to **nextstep** should receive the same level of service as other **nextstep** customers. This has meant an expectation that clients should wait no more than five days for an appointment. However, this does not necessarily tie in with what would be most suitable for the customer. For example, it may be preferable to arrange appointments to coincide with their next sign-on appointment.
- Advisers, at both **nextstep** and Jobcentre, are not always clear about the differences in the level and type of service **nextstep** provide as part of the IES trials and more generally. This, combined with the paperwork required to make referrals, has meant that signposting to **nextstep** can be a preferred option for some Jobcentre Plus staff.
- The funding model was reported not to encourage subcontractors to invest in additional staff capacity to meet demand, and therefore reduce waiting times. Subcontractors are paid for every appointment they undertake. Due to the way in which they are funded, subcontractors aim to fill advisers' time with a mixture of IES and non-IES appointments. There is no financial incentive for contractors to undertake more IES appointments, even though it is regarded as a priority by senior managers at regional and national level.

This chapter presents an overview of the quantitative data relating to waiting times obtained from the three trial areas studied. It then considers the issues outlined above in more detail.

## Overview of the case-study areas

### Waiting times

Data on waiting times is not systematically recorded within or across regions. Hampshire recorded and provided us with information on average waiting times by town and the West Midlands provided data on the monthly range of waiting times by sub-region. There was no data about waiting times for the areas in the East region. The findings from this information are reported below, however we would recommend that:

- a) waiting times are recorded in each region, sub-region and office
- b) average waiting times are calculated in order to track changes over time and differences within and between regions. This would require data to be collected for individual customers rather than at an aggregate level.

### Waiting times in the West Midlands

Within the West Midlands there are variations in the waiting times between sub-regions and between offices within those sub-regions. In May 2009, a report for the Regional Implementation Board identified that two out of the six sub-regions had an average waiting time of over two weeks, which gave them a red rating, two areas had average waiting times of one to two weeks and two had average waiting times of less than a week (Table 3.1).

Table 3.1: Average waiting time rating by sub-region of the West Midlands

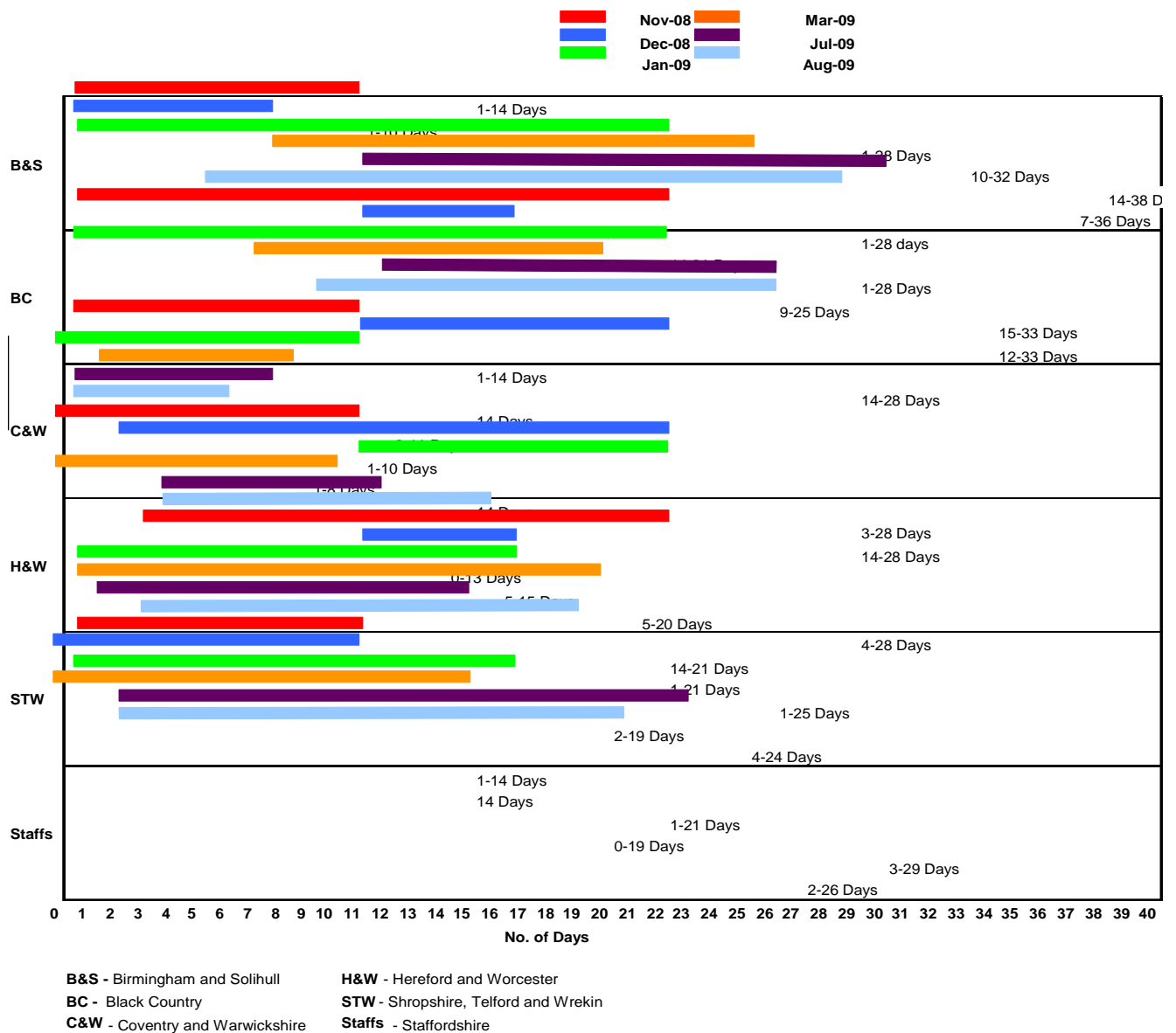
	Waiting times
Birmingham and Solihull	Red
Black Country	Red
Coventry and Warks	Green
Herefords and Worcs	Green
Shropshire Telford & Wrekin	Amber
Staffordshire	Amber

Source: *Traffic lights from May RIB report (Green = less than 1 week, Amber = 1-2 weeks, Red = More than 2 weeks)*

Information on the range of waiting times for the sub-regions in West Midlands shows that the range of customer waiting times differ each month within and across sub-regions (Figure 1). There were no discernable patterns to the ranges. There was no information on average waiting times which would be more helpful to assess changes over time and to see whether and to what extent the highest and lowest waiting times signalled by the ranges are typical.

The largest range in waiting times was in Staffordshire in July 2009 when waiting times ranged from 3 to 29 days. The shortest range in waiting times was in Black County and Shropshire, Telford and Wrekin in December 2008 when waiting times ranged from 14 to 21 days.

Figure 1: Range of **nextstep** waiting times in West Midlands



The ranges for the two “green” areas outlined in Table 3.1 (Coventry and Warwickshire and Hereford and Worcester) seem to be more concentrated on the left hand side of the diagram; while the ranges for the two “red” areas (Birmingham and Solihull and the Black Country) are more to the right. This suggests that average waiting times mask huge variation over time and between offices within the areas.

### Waiting times in Hampshire

Information from Jobcentre Plus shows that the number of working days until the next available **nextstep** appointments in their Hampshire offices range from one to 17 days (Table 3.2). In ten offices customers would have to wait five days or less for the next available appointment. In eight offices the next appointment was over five days away. However, as no information was available about the number of referrals this data is based on, nor the time period to which it refers, it is difficult to draw

conclusions from these figures, other than that there is a large variation in waiting times between offices.

Table 3.2 Number of days until **nextstep** appointments in Hampshire by office

<b>Town</b>	<b>Number of working days until appointment</b>
Portsmouth	1
Southampton	1
Havant	3
Aldershot	4
Andover	4
Lymington	4
Winchester	4
Alton	5
Bordon	5
Gosport	5
Eastleigh	6
Hythe	6
Fareham	7
Newport	7
Farnborough	10
Ryde	11
Basingstoke	16
Cosham	17
Petersfield	No appointments recorded
Ringwood	Not available

*Source: Jobcentre Plus Hampshire. Data correct on 30/07/09.*

*The time period of this data was not provided, but it is believed to refer to the week commencing 20/07/09.*

### **Summary of the implementation structure**

Waiting times and other implementation issues are overseen by the Regional Implementation Boards (RIB), which comprise senior managers from the Learning and Skills Council and Jobcentre Plus. Prime Contractors are responsible for providing regular updates, including on waiting times, to the RIBs from their management information.

In the West Midlands, the model for overseeing the trial is changing. Operational issues will now be discussed at a separate forum. At this stage, it is not clear what impact the change to the arrangements for overseeing the trial in the West Midlands will have on the management and review of waiting times.

It has been suggested in the West Midlands that the Prime Contractor was not sufficiently involved in the planning and initial implementation stages of the trial. This lack of engagement was possibly caused by the fact that planning for the IES trials took place alongside the tendering process for the **nextstep** contracts. In future roll

outs involving the Prime Contractor in the development stages might help all sides to estimate and plan for delivery of the service to best match the anticipated demands, and to consider contingency plans to manage waiting times if they rise too high.

It was suggested that the Prime Contractor model has made it slightly more difficult to get messages regarding the trial, including those relevant to waiting times, across to frontline delivery staff.

*"That set-up [Prime Contractor Model] has made it very difficult to get messages across to front line advisers... there are a number of tiers between us and the actual advisers on the front line" - National Stakeholder*

There are feedback mechanisms in place for contractors to highlight service delivery issues to the Prime Contractor, such as the factors constraining them to reduce waiting times. However, a number of subcontractors reported some frustration that they did not have a sense of how their feedback on service delivery issues was dealt with at regional level.

### **Other nextstep delivery**

Delivery of the IES trials was added to the main **nextstep** contract. The Prime Contractors and their sub-contractors were required to meet the demand for this service in addition to delivering the **nextstep** enhanced, and differentiated and personalised services.

In addition to the **nextstep** contract which included the IES work, some of the sub-contractors we spoke to described other work they were delivering, such as European Social Funded advice and guidance work, as well as redundancy work. This was reported to have increased during the recession, further constraining their ability to increase capacity to meet demand for IES work.

Although running alongside other contracts, many contractors and advisers said the IES trials were their delivery priority, primarily because of the trial status and the need to provide the service to a certain number and diversity of customers in order to test whether the model worked. However, other advisers and a small number of sub-contractors said that the IES trials were an equal business priority with the other services they provided. This was largely because IES work paid the same per session delivered, but also in terms of equality of access to their services for all their customers. This aspect is discussed in more detail later in this chapter.

### ***Set up and management arrangements***

#### **Contracting arrangements**

Service provision for the IES trials has been commissioned through a separate schedule in the main **nextstep** contract awarded to the new Prime Contractors on 1 August 2008. The Prime Contractor model was implemented from August 2008 and Prime Contractors were able to decide how many sub-contractors they wanted to use to deliver the IES work, although these plans and the decisions about the



number of sub-contractors to use were made before the IES trials areas were decided.

The West Midlands has fewer sub-contractors than any other region. At the outset of the IES trials there were six subcontractors, covering a sub-region each. In most other regions each Prime Contractor works with between 60 and 80 subcontractors. While there are clear transaction cost savings generated by having relatively few subcontractors, it has been suggested that an operating model with a larger number of subcontractors provides additional flexibility to cope with changes in demand, and spreads any financial risk associated with delivering the IES trials across more organisations. The effects of the number of sub-contractors on waiting times are discussed in more detail in Chapter 4.

The West Midlands was chosen to implement the trials across the whole region, whereas in the South East and Eastern regions smaller areas were chosen (Hampshire and the Isle of Wight, and Cambridgeshire, Suffolk and Norfolk). The IES trials in the West Midlands began at the end of September shortly after the prime contracts were awarded in August 2009. This appears to have had a number of effects.

The new Prime Contractors had to deal quickly with a new element of provision, alongside putting measures in place to deal with the new contracting and service delivery arrangements under the new **nextstep** contract. In particular, there was relatively little time for the Prime Contractors to assess the resource implications and alter resources to deal with the extra demand that the trials would create.

A number of respondents suggested that starting the trials almost immediately after awarding new **nextstep** contracts, which in themselves had new contractual and service delivery arrangements, placed additional burdens on contractors. This point was accepted by representatives from both the commissioners and service providers:

*"Our prime contractors have had a lot to contend with. You know, on the 1st August they had completely new contracts, new service offer, new customer groups, new funding model and...a new infrastructure." - National Stakeholder*

*"So that had a major impact right at the very beginning, just as we were trying to bed in and get used to a regional contract, we suddenly had this massive thing attached to it, which would take a higher priority." - Stakeholder, Area A*

The limited time available between the start of the new contract and the start of the trials appeared to have led to a number of teething problems, which may have had an initial impact on waiting times in the West Midlands. For example, it was reported that there were difficulties with the regional booking system at the start of the trial. Training also had to be provided on a "just in time" basis. This could have affected adviser awareness and understanding and subsequently the volume of referrals:

*"We had a two week window to deliver them [training courses] to Jobcentre supervisors before we went live on the project. During that time, as you can imagine, because we were the first people to implement, things were changing on a daily*

*basis, so when we were delivering the training, what we had planned on Monday... might be slightly different from Tuesday" - Stakeholder, Area A*

IES provision is also managed through an extension of the **nextstep** contract. While there are targets for the delivery of **nextstep** sessions, there are no specific targets for the delivery of IES-specific sessions. This makes it more difficult for Prime Contractors to hold subcontractors to account if they are failing to provide sufficient appointments for the IES trial. In addition, although most interviewees acknowledged that there was an aspiration for a five day waiting time, this was not part of the contracts or delivery targets.

### **The funding model**

The IES provision therefore also uses the same funding model as the wider **nextstep** contract. This funding model is effectively, a "pay as you advise" model, whereby subcontractors are paid a fee for every appointment they undertake. Many respondents argued that this does not encourage subcontractors to invest in additional capacity to meet any increases in demand for services through the IES trials and thereby bring down waiting times where they are long. This is because the financial risk lies with the subcontractor, who must increase capacity with no guarantee of future income to pay for that additional capacity, particularly where attendance rates have made it difficult to generate sufficient income to cover existing costs.

*"If people aren't turning up, there's reluctance to invest, because if they're not going to see anyone or be paid."*

Waiting times for IES clients might be reduced if contractors held more appointments open for IES appointments. However, they are extremely reluctant to do this. Due to the way in which they are funded, subcontractors aim to fill their advisers' time with a mixture of IES and non-IES appointments. Holding more appointments free for IES customers runs the risk of a) the appointment slot not being filled at all, and b) being filled with a client that is less likely to attend and therefore generate a payment for the subcontractor than customers coming through other routes, where attendance rates were reported to be higher.

*"The people that have been hit the hardest are the subcontractors, because the issue being, if I'm a prime contractor and you're one of my subcontractors, you only get paid for those people that you actually see... So that's the hard thing, and it makes it difficult for planning and for subcontractors to be able to plan their service, and particularly with the IES customers, because... they get huge amounts of DNAs"*  
- National Stakeholder

Furthermore, as several interviewees discussed, IES appointments do not lend themselves to group sessions, where the subcontractor can guarantee a significant amount of income from a single appointment slot (they are paid per individual seen). By contrast, the Skills Health Check undertaken during IES appointments requires a one-to-one approach. If that individual fails to attend, the subcontractor generates no

income at all. By contrast, if one individual does not attend a group session, the contractor will still generate income from the other attendees at that session.

Therefore, even though IES waiting times are regarded as a priority by senior managers at regional and national level, the current funding model provides little incentive to subcontractors to allocate more adviser time to the IES trials. The impact of the funding model on waiting times was summed up by one respondent as follows:

*"It hasn't been funded sufficiently to be able to address it [the IES trial] as fully as we would have liked, and the main contract has worked against the trials... if people have booked other appointments around it to make sure that their staff aren't sitting there twiddling their thumbs for half the day, then that of course pushes some waiting times back." - Stakeholder, Area A*

The impact of the funding model on waiting times, particularly in relation to increasing staff capacity is discussed further in Chapter 4.

### **The same level of service**

This section considers the assumption that clients receiving the mainstream **nextstep** service and those seen as part of the IES trials should receive the same level of service, particularly as the majority seen through both routes are Jobcentre Plus customers. This approach was generally endorsed. For example, one stakeholder in Area A said:

*"Over 60 per cent of those people we see are referred by the Jobcentre. Only 20/21 per cent are seen under the trials. Now, to me, why don't we just make it all the same thing - that Jobcentre just refer them across to us under **nextstep**? It's the same service.... We don't have this fight over mainstream and trials appointments, and leave it to us. ...we're seeing twice the amount of people we see under trials who are Jobcentre Plus referrals anyway. Why should they be treated any differently?"*

As the majority of **nextstep** clients were Jobcentre Plus customers, advisers in particular felt uncomfortable prioritising one group because they were referred as part of IES over other groups that could, for example have been signposted.

*"Tension comes from the fact that on the one hand we have the IES project asking for more and more appointments, but on the other hand, because we're in an economic downturn we've got more people coming in off the streets...what we're basically having to do is rob Peter to pay Paul." - Stakeholder, Area B*

Prioritising a finite number of advisers to IES and decreasing waiting times for this service was thought to divert resources from other work, increasing waiting times there.

Interviewees questioned the difference in the level and type of service for customers who are sign-posted and those who are referred. Although **nextstep** advisers said they would only use the Skills Health Check diagnostic tool with IES referred customers, they did not use this tool with the majority of these customers. For example, data from the West Midlands shows that 26 per cent of customers seen as part of the IES trials have undertaken the Skills Health Check diagnostic since the

start of the trials and July. Many **nextstep** and Jobcentre Plus advisors did not see a distinction between mainstream and IES provision.

This has meant that referred and sign-posted customers are often drawn from the same group. The lack of clarity about the differences between the services has been compounded by the paperwork requirements for the IES trial. It is more time intensive to refer customers, and particularly when Jobcentre Plus adviser time is limited, it is quicker to signpost rather than refer customers to **nextstep**.

The expectation of a five day waiting time for IES appointments has been drawn directly from the customer charter for mainstream **nextstep** provision. At the time IES provision was being planned, senior managers did not want to have different waiting times for Jobcentre Plus and other customers:

*"But to have a blanket, for Jobcentre Plus customers, that the standard – because that's what we're talking about, customer service standard – is two weeks. I think it's wrong because, I think, what you're doing then is you're having a two tier service." - National Stakeholder*

However, this does not necessarily tie in with what would be most suitable for the customer. For example, it may be preferable to arrange appointments for their next Fortnightly Job Review – while this might entail a longer wait, it may be more convenient, and may improve attendance rates. Further consideration should be given to whether the five day waiting time expectation is suitable for the IES trials and whether meeting this would increase waiting times for other **nextstep** customers.

### **Staff training and development**

A great deal of training has been delivered and guidance issued on the IES trials. General awareness of the trials appears to be high among frontline delivery staff. However, plans for joint training of **nextstep** and Jobcentre Plus advisors have been affected by the recruitment of large numbers of new Jobcentre Plus advisors to cope with the increasing claimant count.

*"Because our training window was so tight... Jobcentre Plus trained Jobcentre Plus advisors and **nextstep** trained **nextstep** advisors. What we said all along was, it would have been nice for us to have had some joint training, some joint workshops, so everybody got the same message at the same time." - Stakeholder, Area A*

This has possibly led to new Jobcentre Plus advisors starting their roles within trial areas with a limited understanding of the **nextstep** service, which in turn may have affected the number of referrals they make, and the type of customers they refer. Short term fluctuations in referral rates caused by increased awareness immediately after adviser training events are likely to affect waiting times, particularly if extra capacity can not be made available to cope with increases in demand. This is explored in more detail in the following chapter which looks at how waiting times have been planned for and managed in practice.

## Service delivery

### *Chapter summary*

- Adviser capacity was reported to be the main constraint to reducing waiting times. In the West Midlands the number of referrals per adviser ranged from 149 to 396 across the sub-regions.
- Most sub-contractors had lost money on delivery of the **nextstep** contract so far, so were unable to financial justify to senior managers additional staffing.
- Spider booking and reducing the appointment lengths has been used to try to maximise the existing adviser capacity.
- In some areas **nextstep** fully co-located with Jobcentre Plus. In others this was partial. In others **nextstep** was unable to co-locate at all. There was some confusion about whether IES services could be delivered outside of Jobcentre Plus premises. Where managers wanted to increase adviser time on IES, but Jobcentre Plus could not accommodate them, the costs of hiring additional premises were seen to be prohibitive. In addition, co-location was felt to have benefits, such as building relationships with advisers and raising the profile of the service, and advisers did not want to lose these.
- The West Midlands has the highest unemployment rate of any English region. The number of referrals in this trial area have been consistently strong, whereas respondents in the East and South East described fluctuating or a lack of referrals from Jobcentre Plus. The data supports this. For example one week in June 19 per cent of IES appointments in the East region went unfilled.
- Adviser awareness and understanding, and feedback from customers about the benefits of the service were also described as affecting referral rates. In the South East referrals were at a high in March when training to place, and halved in April.
- The level of demand in the West Midlands seems to have meant sub-contractors have less flexibility to manage adviser time between venues, as there is little slack.
- There were several examples of good practice of contractors managing adviser time flexibly to meet peaks in the number of referrals. There were also good examples of ways in which staff are trying to increase attendance rates which in turn affected the number of customers they saw, and the revenue generated from the contract.

This chapter first looks at the supply of the **nextstep** service: how it is resourced (including the number of advisers and premises) and how advisers manage their time to provide appointments. Demand for the service in the form of referrals from Jobcentre Plus is then explored. Lastly, how **nextstep** try to balance and manage the supply of and demand for **nextstep** aspect of the IES trials is discussed.

## Supply of the nextstep service

### Resourcing the IES trials

When **nextstep** was informed that their area would be part of the IES trials respondents in the case-study areas said they worked with Jobcentre Plus to allocate **nextstep** adviser time to specific Jobcentre Plus offices. In the planning stages assumptions were made about the proportion of Jobcentre Plus customers that would be referred at the New Jobseeker's Interview (5 per cent), the 13 week interview (10 per cent) and the 26 week interview (30 per cent), although these were not made into targets for Jobcentre Plus advisers in order to try to ensure only appropriate clients were referred.

These “mixed signals” about planned referral rates may have led to confusion among frontline staff about the expected number of referrals they should make. Fluctuating referral rates and numbers over the course of the trial has made ongoing resource allocation problematic in some locations. As one stakeholder points out:

*"The predictions and the actuals vary tremendously. So if we really supplied the staff to meet all those predictions, we'd have had more people sitting around twiddling their thumbs doing nothing, and we couldn't afford to do that, because it's all 100% output related." - Stakeholder, Area A*

**nextstep** adviser capacity was reported to have been planned using these estimates of future demand. These estimates were broken down to Jobcentre Plus office level. Co-location days were allocated to **nextstep** advisers, taking into account Jobcentre Plus capacity to host them. Some offices were able to offer **nextstep** space to co-locate every day, with others only once a fortnight, but most fell somewhere in between the two. In a small number of cases there was no capacity for **nextstep** to co-locate in Jobcentre Plus.

The number of **nextstep** advisers available to undertake advice work on the IES trials differs between the sub-regions. In the West Midlands, for example, one sub-contractor has five advisers and another has thirteen advisers (this is the highest in that region). Overall, the number of qualified advisers and their capacity was cited most frequently as largest influence on waiting times.

Contractor's ability to increase the number of advisers they had was reported to be constrained by the financial viability of the contract (most reported that they had made a loss on the contract and therefore were unable to put a business case to Finance Directors to recruit more staff), and the funding model, as discussed in Chapter 3.

*"The obvious answer is that we need more adviser time, but where the money would come from is the crunch question" - Stakeholder, Area A*

In addition, a small number of interviewees reported that there was a shortage of people qualified in Information, Advice and Guidance to Level 4 to take up these

positions even if they were able to recruit. Despite these apparent constraints, in the South East advisers had recently been recruited to support the trials.

Instead of appointing additional permanent staff it was most common for subcontractors to recruit and use temporary workers to increase capacity at specific points and locations, for example where waiting times were particularly long, when advisers were taking annual leave, or where there was an absence due to sickness. In the East region there was at least one subcontractor whose staff were on term-time only working, which was a legacy from previous contract and working arrangements. Their non-working periods were reported to be covered by staff from other subcontractors.

In the West Midlands, the Prime Contractor was part way through the recruitment process for a pool of advisers that could 'trouble-shoot' across the region and work in areas where waiting times were longest, in a bid to reduce them.

Nevertheless, use of temporary workers to help meet peaks in demand or cover staff absence was not without risk.

*"I've worked it out...if they've [a temporary adviser] got an attendance rate of 60 per cent then they will pay for themselves. If the two week trial turns out that we have made a loss on that...then we won't be able to take on a temp worker either and then our hands are even more tied". - Stakeholder, Area A*

The Prime Contractors in the East and West Midlands were taking on additional subcontractors to help deliver the **nextstep** contract, freeing some capacity of IES-trained advisers would to spend more time on the IES trials.

### **Managing adviser time**

Advisers delivering IES trial appointments reported a variety of ways in which their time was structured and that they managed their workload. The amount of appointments per adviser day varied, mainly because there were variations in the length of appointments. Forty-five minute appointments were most common across the West Midlands region. Some advisers in South East said they allowed an hour and twenty minutes per client, but others had reduced this down to 45 minutes to try to reduce the extent of downtime caused by customers that failed to attend.

*"We did have hour interviews...but I've now reduced mine down to three quarters of an hour due to the fact of the no-shows, but it's just not long enough". - Stakeholder, Area C*

Five appointments per day was the lowest among the advisers we interviewed and this was due to the travel time required to attend the Jobcentre (the area was rural). Twelve appointments per day was the most that one adviser said they had in a day. These volumes tended to be where offices were running 'spider booking', where appointments are staggered - i.e. 45 minute appointments are booked every half an hour.

Spider-booking was felt to mitigate against the rate of failure to attends, and ensure that both a sufficient number of clients were seen and income generated per day. However, some advisers whose time was not managed in this way expressed that they would not like to operate spider booking, in case everyone turned up (and they cited some days where this had been the case).

*"It [spider booking] hasn't happened with us, because you can guarantee that I'd have four turn up at the same time" - Stakeholder, Area B*

It was reported to be easier to use spider booking where there were two or more advisers in an office at any one time. Then if more clients than anticipated turned up, they could be shared between a number of advisers rather than just one, and no customer would face a delay of more than 15 minutes. Some areas had used spider booking for particular week days where the number of people failing to attend was found to be higher than average, and others had focused it at the start and end of the day, where again they felt there tended to be a higher proportion of customers failing to attend.

In the East region some advisors spoke about working late, beyond 5pm to provide extra appointments and also working on Saturdays to try to meet demand in areas with longer waiting times.

### **Co-location and premises capacity**

In all the case-study areas **nextstep** and Jobcentre Plus said they had a good working relationship. In many offices there had been some degree of co-location and joint working before the IES trials. This relationship was not formalised in any way. Jobcentre Plus had not committed to **nextstep** to provide a certain level of capacity within its premises, or a particular number of referrals. Equally, **nextstep** had contracted with the LSC to provide the service rather than with Jobcentre Plus.

Stakeholders in all the areas described how both **nextstep** and Jobcentre Plus were involved in planning capacity for the IES trials, estimating the number of referrals and calculating the required premises capacity.

At the outset of the trial, data from the West Midlands shows that the planned number of days of co-location per Jobcentre Plus office ranged from one to twelve days per month, with a total of 247 days of co-location planned in total. The qualitative work indicates that changes have since been made to the number of co-located days (with increases in some offices and reductions in others. This is supported by the May 2009 report for the West Midlands Regional Implementation Board which puts the figure at 428 co-located days (although it does not indicate where some of these are for half days).

In some cases implementing these plans was challenging because of the increasing demands placed on Jobcentre Plus premises by the recession and the necessary increase in their own advisers to respond to the increases in benefits claimants.



In all areas the recession has put pressure on Jobcentre Plus premises as extra advisers have been recruited to cope with the increase in benefit claimants. This meant that some **nextstep** advisers had had their co-location days reduced. A few reported that they had had to leave Jobcentre Plus altogether and deliver IES solely out of other premises. The quotes below illustrate the issue:

*"We originally said that we would be happy to site accommodation and seating...for **nextstep** to do their interviews...we're in a situation now where we don't actually have enough space because we have more customers". - Stakeholder, Area B*

*"As their registers go up and they take on more staff it means we're in danger of being displaced...on a week by week basis we can be phoning up to see whether we have a desk, so that can't be good for planning and trying to organise things". - Stakeholder, Area A*

In itself the decrease in the number of co-located days should have been manageable, by delivering the service from alternative premises. The contract for the Prime Contractor in the West Midlands sets out that there are three possible approaches to the co-location of **nextstep** services with Jobcentre Plus: full co-location, partial co-location and peripatetic and outreach services where **nextstep** advisers respond to the needs of Jobcentre Plus customers in shared rural and outreach locations.

However, there was a lack of clarity about whether or not **nextstep** advisers are able to see clients as part of the IES trial in premises other than Jobcentre Plus offices. These examples are typical and illustrate the different views:

*"We're using Connexions centres as well so some of the referrals are being seen in Connexions offices as well, but we're only allowed to see Jobcentre referrals in the Jobcentre". Stakeholder, Area A*

*"Not all the appointments take place in the Jobcentre, because the Jobcentre's haven't got capacity, so we use colleges and some libraries". Stakeholder, Area B*

Where sub-contractors believed that they could only see IES trial clients in Jobcentre Plus, then this could increase waiting times. In addition, where advisers were co-locating on a part-time basis (i.e. for one day a week), then it was reported to be more difficult for them to meet the five day waiting time target. If they are fully booked for one day, then waiting times were over five days. One said:

*"They only need a **nextstep** adviser once a fortnight, which means that waiting times can easily reach ten days or more"*

Even where it was understood that **nextstep** advisers could meet IES customers outside of Jobcentre Plus there could be issues finding suitable premises (particularly if sub-contractors did not have their own premises) and paying for other premises, such as community venues, based on the income from the **nextstep** contract.

*"We can increase availability in that area through additional locations that we could operate from, so that may well be our own centres, or libraries or literally anywhere...but in some areas we've hunted high and low for another venue to*

*operate from...we don't have offices, the library is fully booked by other agencies and there's no other community venues...other than perhaps Tesco...so consequently we're stuck with one day a fortnight" - Stakeholder, Area A*

This lack of premises could explain why, in a small number of areas, advisers work with other clients in Jobcentre Plus on their co-located days displacing IES customers and increasing waiting times for them.

*"The tricky bit with location is that we're so cheap as an organisation, we can't afford to buy the premises that we work in....so the original model as I understood it was that we'd offer to help some Jobcentre seekers for part of the day and then our time to do general guidance the rest". - Stakeholder, Area C*

*"We haven't got any other premises from which we could deliver either, so we do all the work in the Jobcentres and we pick up regular clients as well as trial ones". - Stakeholder, Area A*

Overall, advisers were keen to co-locate with Jobcentre Plus, as they felt it brought many benefits to the service. They suggested that it helped them to build relationships with advisers, and to make the service 'visible' to Jobcentre Plus advisers in order to promote referrals. In addition, it was felt that customers knew where to attend and that appointments could be coincided with signing-on days to try to minimise travel costs for the customer. Advisers also felt that delivering in other venues could affect the attendance rates and mean they could no longer practice some of the ways in which they managed failures to attend, such as by using walk-ups (customers sign-posted immediately by the advisers), as discussed later in this chapter.

### ***Demand for the nextstep service: referrals***

Demand for the **nextstep** service comes from the number of referrals made by Jobcentre Plus. In order to make a referral to **nextstep** as part of IES Jobcentre Plus advisers need to ring a central booking line to make an appointment and then complete a number of forms. These forms include collecting data to ensure that the customer gives consent for their details to be passed to **nextstep**. The referral is also logged on Jobcentre Plus customer management systems.

Customers can also be signposted to **nextstep** services, although this is officially outside of the IES trial. If a customer is signposted then the Jobcentre Plus adviser might make them aware of the service, and give them a leaflet for example, but the customer will be responsible for making an appointment and the Jobcentre Plus adviser will not have to complete IES paperwork or log it on Jobcentre Plus systems.

The interviews with stakeholders showed a number of factors affect referrals to **nextstep** as part of the IES trials. These include:

- adviser awareness and understanding (with peaks in referrals reported after awareness raising and joint training);
- feedback from customers about the benefits of the service (with poor feedback making advisers more reluctant to refer in future);

- associated paperwork for Jobcentre Plus advisers (meaning some preferred to signpost a customer rather than refer them);
- the number of new claimants and customers reaching 13 and 26 week review meetings (affected by the recession and redundancy).

In the West Midlands the recession has increased the number of people claiming Jobseeker's Allowance quite substantially, over and above the volumes discussed in planning. The West Midlands now has the highest unemployment rate of any of the English regions, at 5.4 per cent. There were 67,000 additional people claiming Jobseeker's Allowance in July 2009 compared to September 2008, with the largest number of new claims in Birmingham (12,800)<sup>4</sup>.

The recession has affected referrals in other IES areas too, although the rise in the claimant count overall has slowed since February when the East and South East areas started to implement the trials. In some areas, such as Norfolk, there has been a small decrease in the Jobseeker's Allowance claimant count during this time. One adviser in the Area B said:

*"I work in one small town where they used to have five new sign-ons in a week, where they're now having 26 a day"*

In the data we were able to collate, there are different estimates of the number of referrals made by Jobcentre Plus. In the West Midlands, the **nextstep** figure for the week ending the 10th July, put the cumulative total of the number of booked appointments at 13,287, and of those 7,466 (or 56 per cent) have the IES form. Jobcentre Plus figures from the start of the trials up until July 2009 show that there were 16,771 referrals in the West Midlands. Table 4.1 shows the number of referrals for all the case-study areas from their inception up until the end of July 2009.

Table 4.1 Number of Jobcentre Plus customers referred to **nextstep** services (up to the end of July 2009)

	East of England %	South East %	West Midlands %
New Jobseeker Interview	3,078	1,297	11,459
13 week reviews	775	119	3,371
26 week reviews	206 <sup>2</sup>	n/a	1,892
Total number of referrals <sup>1</sup>	4,065	1,530	16,771

Source: Jobcentre Plus' Management Information Report.

- 1) The 'total number of referrals' includes customers referred from 17 and 21 week reviews as well as NJI, 13 and 26 week reviews. However, no data was available for Hampshire and the Isle of Wight and Norfolk for the 21 and 26 week reviews, therefore this information is not included in the total for these regions.
- 2) Norfolk data was not available for 21 and 26 week reviews, therefore the East of England 26 week review figures are for Cambridgeshire and Suffolk only.

<sup>4</sup> Office for National Statistics: claimant count

However, when comparing the proportion of customers being referred to **nextstep**, the East of England refer a slightly higher proportion (4.3 per cent of customers) to **nextstep** compared with the West Midlands (3.7 per cent) and Hampshire and Isle of Wight (3.2 per cent) (Table 4.2). The volume of referrals in all areas falls short of the proportions estimated in the planning assumptions.

Table 4.2 Proportion of Jobcentre Plus customers referred to **nextstep** services (up to the end of July 2009)

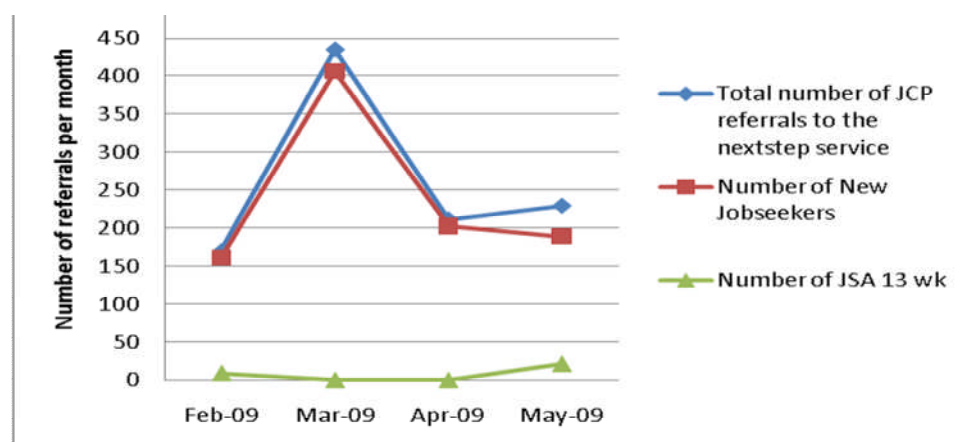
	Expected proportion of referrals %	East of England %	South East %	West Midlands %
New Jobseeker Interview	5	4.8	3.8	4.1
13 week reviews	10	4.1	1.2	2.9
26 week reviews	30	5.0 <sup>2</sup>	n/a	4.8
All stages <sup>1</sup>	n/a	4.3	3.2	3.7

Source of expected proportion of referrals: regional Jobcentre Plus and LSC staff interviews. All other information from Jobcentre Plus' Management Information Report.

1) The proportion of customers referred from all stages includes customers referred from 17 and 21 week reviews, as well as NJI, 13 and 26 week reviews. However, no data was available for Hampshire and the Isle of Wight and Norfolk for the 21 and 26 week reviews, therefore this information is not included in the overall referral rates for these regions. Norfolk data was not available for 21 and 26 week reviews, therefore the East of England 26 week review figures are for Cambridgeshire and Suffolk only.

A small amount of information was available on the number of referrals per month to **nextstep** in Hampshire and the Isle of Wight (Figure 2). In March the number of referrals more than doubled compared with the previous month. In the other months shown in Figure 2 the number of referrals to **nextstep** was relatively stable. This highlights the rapid changes in demand.

Figure 2 Trends in referrals to **nextstep** in Hampshire and the Isle of Wight



Source: IES Base MI report v19 May 2009

There are no data on the number of referrals by month for the West Midlands, but interviewees in this region suggested there was a steady stream of referrals, whereas the referrals in the East and South East region were more likely to be described as variable. A **nextstep** stakeholder in the South East region said the referral numbers had been lower than hoped. On average they receive 50 referrals per month, but were expecting hundreds. The number of referrals was reported to be higher at the outset of the trials in the East and South East and have since decreased. This is illustrated in the South East by the peak in referrals in March 2009 shown in Figure 2. These variations were felt to be due to the awareness and understanding of Jobcentre Plus advisers:

*"We've gone from having very very high numbers and not being able to sort of realistically cope with them...to that I have gaps in my day, and I think it's because the advisers were told to lay off. So they've gone from signing everyone through to actually only doing the odd two or three". - Stakeholder, Area C*

*"They're [an adviser] meant to be there on a Tuesday, all day. We were getting no bookings and I said I'm really not happy sending somebody out to sit there all day for no bookings. So we've agreed that that one can be on an ad hoc basis with the adviser and she will go out at her convenience and the client's convenience" - Area C*

There are other examples in the East and South East regions of advisers' time in Jobcentres being reduced because of a lack of referrals.

*"In the beginning everyone was referred...and then we sort of highlighted that we were getting everybody and his dog and they sort of stopped referring anybody" – Stakeholder, Area C*

*"Up until a month and a half ago we were doing three days a week, and we had approximately seven, six or seven clients booked in each day, and now we're down to a day a week" – Stakeholder, Area B*

*"The referrals have gone up, so I can't complain on that, and it's not like I'm going in now and I find I've only got two appointments, but I mean days are full now" – Stakeholder, Area B*

The two Jobcentre Plus advisers interviewed in the South East region both felt that other services could be more helpful for their customers.

This illustrates that lower waiting times may not necessarily be a good thing for the trials, for example if it is due to a low number of referrals or adviser over-capacity. With the limited quantitative data we have and from the interviews with stakeholders, it appears the West Midlands has seen the most constant levels of demand.

## **Balancing supply of and demand for the service**

### **Planning assumptions**

Looking at the initial planning assumptions for the West Midlands, it can be seen that the match between supply and predicted demand for the IES **nextstep** service varied substantially. At the planning stage there were large variations in the ratio of

planned referrals to adviser co-location days per month. Areas where there were a higher number of planned referrals predicted, in fewer co-located adviser days, are now the areas experiencing longer waiting times.

The timeframe of the data we have is not entirely clear, but if we assume that the number of planned referrals relates to a year, then the planned number of referrals per co-located adviser day ranges from 2 to 15. This illustrates that at the outset some offices were likely to be more challenged by the number of referrals than others.

Overall, nine out of the ten offices with the highest number of anticipated referrals to adviser co-located days are in Birmingham and Solihull and the Black Country, which have waiting times higher than two weeks on average. Six out of the ten offices with the lowest number of anticipated referrals per co-located adviser day are in the Marches, an area with relatively low average waiting times.

These referral predictions are supported by actual referral numbers. Table 4.3 shows that the total number of referrals (as documented by Jobcentre Plus) per adviser ranges from 149 in The Marches (which is Hereford and Worcester and Shropshire) up to 396 in Birmingham and Solihull. With the **nextstep** referral data the range is wider, with 407 referrals per adviser in Birmingham and Solihull and 135 referrals per adviser in Staffordshire. The areas identified as having longer waiting times have the highest number of referrals per adviser.

Table 4.3: **nextstep** advisers per referral

	Referrals to SHC*	Referrals to SHC **	No. of advisers	Referrals per adviser *	Referrals per adviser **
Birmingham and Solihull	3,165	3,258	8	396	407
Black Country	4,328	4,228	13	333	325
Coventry and Warwick	3,272	2,442	9	364	271
Staffordshire	1,598	1,080	8	200	135
The Marches <sup>5</sup>	2,082	2,279	14	149	163
TOTAL	14,445	13,287	52	278	256

Source: *Jobcentre Plus referrals: IES trials Management Information: Summary to end of June 2009, CSWP MI for the week ending 10th July 2009*

\* = *Jobcentre Plus data*, \*\* = **nextstep data**

Although, this analysis does not take account of the actual number of days spent by advisers on the IES trials (co-located) and the proportion they spend on other advice and guidance work it does give some indication of a relationship between adviser capacity and waiting times.

<sup>5</sup> Shropshire and Herefordshire

In the East region data were only available on the number of appointments available for Jobcentre Plus to book, not the number of advisers. Table 4.2 shows that the number of **nextstep** appointments vary by week within Cambridgeshire and Suffolk as a whole<sup>6</sup>. The total number of appointments available per week ranged from 108 to 183 (a difference of 75 appointments per week). In comparison, information available on the number of appointments available in Hampshire and the Isle of Wight for booking for Jobcentre Plus customers showed 257 appointments were allocated by **nextstep** in w/c 20/07/09.

The data suggests that as many as one in five (19 per cent) of appointments may not have been allocated during the week the data was recorded (w/c 29/06/09)<sup>7</sup>. This potentially illustrates the level of spare capacity across this area.

It is not clear how the number of **nextstep** appointments per week are decided upon and why the w/c 29/06/09 had so many more appointments than most other weeks in July and August. It is possible that it is due to staff availability. It could be a reflection of the capacity of Jobcentre Plus to offer co-location during that week. Or it could reflect **nextstep** subsequently scaling back their availability for the IES trials in response to a week where 19 per cent of their appointments went unfilled.

Table 4.4 Availability of appointments in Suffolk and Cambridgeshire July 2009

Week commencing	Total weekly appointments allocated by <b>nextstep</b>	Number of appointments still available at 03/07/09 (Percentage of total)
29/06/09	183	35 (19%)
06/07/09	138	18 (13%)
13/07/09	108	33 (31%)
20/07/09	136	76 (56%)
27/07/09	133	96 (72%)

*Source: Jobcentre Plus. Data correct on Wednesday 03/07/09 at 9.30am.*

The number of available appointments varies by Jobcentre Plus site, ranging from no or one available appointment for the following 3 weeks (Lowestoft in Suffolk and Peterborough in Cambridgeshire) to half of the appointments for the current week still being available (Ely in Cambridgeshire).

The data for August shown in Table 4.5 shows slightly less variation in the total number of appointments allocated by **nextstep** to IES per week within Cambridgeshire and Suffolk compared to the July data shown above. The total number of appointments available per week ranged from 117 to 140 (a difference of 23 appointments per week).

<sup>6</sup> It is also feasible that the number of appointments change as more appointments are made available by **nextstep**. Therefore, the final number of appointments for July may differ to those shown here.

<sup>7</sup> Given the time the data was taken there were only 3 working days left in that week to allocate appointments.

In August, only four per cent of appointments were still available for the following week after the data was taken (w/c 10/08/09), compared to 19 per cent in July. This reflected the fact that eight out of the 12 Jobcentre Plus sites had no appointments still available for the following week (w/c 10/08/09).

Table 4.5 Availability of appointments in Suffolk and Cambridgeshire, August 2009

Week commencing	Total weekly appointments allocated by <b>nextstep</b>	Number of appointments still available at 07/08/09 (Percentage of total)
03/08/09	n/a	n/a
10/08/09	140	5 (4%)
17/08/09	137	38 (28%)
24/08/09	117	89 (76%)
31/08/09	n/a	n/a

*Source: Jobcentre Plus: Data correct on Friday 07/08/09 at 8.35am*

The number of appointments on offer for Jobcentre Plus to book customers into also varies by week in Hampshire and the Isle of Wight. When looking at the number of appointments still available the previous week (for three weeks in May and June 2009) it is clear that there tends to be spare capacity, with appointments being held open that are not filled.

In particular, one week at the end of June has fewer available appointments than earlier weeks in May and June. There is too little data to be able to conclude whether this is a one off due to fewer appointments available (169 compared with 235 in a previous week) or an increase in demand resulting in fewer appointments available the week before. Analysis of data over a longer period (c.4 months or more) would be needed to report any meaningful trends. However, the availability of appointments for the following week could explain the relatively short waiting times of 7 to 10 days in Hampshire and Isle of Wight reported earlier in Chapter 3.

Table 4.6 Availability of appointments in Hampshire and Isle of Wight, May and June 2009

Week commencing	Total weekly appointments allocated by <b>nextstep</b>	Number of Appointments still available the previous week (Percentage of total)
18/05/09	235	58 (25%)
08/06/09	198	42 (21%)
29/06/09	169	15 (9%)

*Source: IES Regional Implementation Board*

### **Managing adviser capacity**

The volume of referrals to IES can vary from one week to the next, both overall and between offices. This level of uncertainty creates the need for adviser time to be managed flexibly as changes are frequent and can be unpredictable:



*"If we had a crystal ball it would be marvellous, but we get peaks and troughs in different areas...we can't just second guess" - Stakeholder, Area B*

Awareness raising activities with Jobcentre Plus staff could create a sudden surge in the amount of referrals. One **nextstep** stakeholder described how they would have to try to manage this in order to ensure that Jobcentre Plus staff didn't then struggle to get appointments for their clients or be put off by the waiting times and then not refer clients in future:

*"Every time we've had initiatives the referrals shoot up, and then we struggle to meet demand, which demoralises the poor Jobcentre Plus advisers, who then might not carry on referring and then we're complaining that there aren't enough referrals, but getting that balance is quite tricky" – Stakeholder, Area C*

In the East, for example, **nextstep** managers reported that they frequently moved advisers from one office to the next, and have borrowed advisers from other regions to help meet peaks in the number of referrals. This approach had also been used in the South East where to meet demand sub-contractors had shared advisers or 'borrowed' advisers from the Prime Contractor. One manager of a sub-contractor said that they were constantly moving advisers around *"like chess pieces"*.

In the East region stakeholders described how they were *"part of a network"* whereby contractors would help each other deliver in Jobcentres as and when referrals were particularly high. This would be organised through the Prime Contractor. This seems like a positive shared approach to keeping waiting times down across the IES trial area, but as Cambridgeshire, Norfolk and Suffolk is one part of a larger region it is questionable whether it would be possible to transfer this way of working to a whole region, as the travel times would be much greater.

Stakeholders in the South East described how they would borrow advisers from other regions because their co-location days were weighted towards certain days of the week. They reported Jobcentre Plus were more likely to be able to host their advisers on Mondays and Fridays.

The benefits of managing adviser time in this way need to be weighed against the benefits gained from having consistency in the advisers working out of particular offices so that they can develop and build relationships with Jobcentre Plus advisers. One stakeholder in the West Midlands said that for these reasons *"we like to keep consistency [in which advisers work from which Jobcentres]"*.

There was also some evidence, both from the interviews and the observation in the East region that appointments for the IES trial were only released up to a certain time. Customers would be referred to an appointment when more became available. This practice could provide an overly positive impression of overall waiting times, depending how the data are collected. One Jobcentre Plus adviser said:

*"I phoned to make an appointment last week and there were no interviews because they were waiting to open some up, and that's quite common"*.

This was supported by another stakeholder who said:

*"They would only display the appointments with RTAP [Regional Telephone Access Point] if they were within the waiting time".*

The number of sub-contractors per area is also likely to limit the feasibility of using sub-contractors to cover each other where there is annual leave, or waiting times are high. In the IES trial areas in the East and South East the Prime Contractor has several sub-contractors per area. In the West Midlands there was initially only one sub-contractor per sub-region. The extra requirements and demand of the IES trial were placed on a smaller number of sub-contractors in the area that was chosen to deliver across an entire region.

In the West Midlands the interviews give a sense that adviser capacity is tighter. This would mean that some of the strategies deployed to provide flexibility and tackle longer waiting times, such as moving advisers between sites would not work so well. One stakeholder in this area said:

*"Because we are so inundated with demand, if I remove one adviser to help another branch, I'm creating a problem in the branch where I've taken them away".*

The costs associated and ease with which sub-contractors could resource advisers flexibly was found to depend on the geography and size of the sub-region. It was more costly to move advisers around rural locations due to travel time, than in urban areas.

*"I can move advisers around quite easily so that they can do half a day in one office and move to another office for half a day because the mileage difference to move them around is not that great" – Stakeholder, Area A*

One rural area of the West Midlands was looking into the viability of providing the service using web cams in rural locations. This would reduce adviser travel time and reduce waiting times in Jobcentres that didn't make many referrals as customers could be seen on a more flexible basis. It may also be possible to make referrals to the Careers Advice Service, for their advisers to work through the Skills Health Check Diagnostic over the phone with customers who have access to a computer and the internet and the skills and confidence to use computer programmes.

### **Managing non-attendance**

As discussed, there are steps that can be taken to maximise the number of clients **nextstep** are able to see, such as how adviser time is managed. In addition, attendance rates can affect waiting times, as available slots are not used and customers who do not attend the first time subsequently rebook. As explained in Chapter 3, contractors are paid on an output basis for the people they see, and are therefore not paid when someone fails to attend. Attendance rates therefore affect the income generated from the contract and therefore the viability of increasing adviser numbers, as one stakeholder in the East region explained:

*"Where people are not attending, we don't get paid for that, and again it makes us even less reluctant to employ more staff to keep waiting lists down"*

Stakeholders felt that the implications of non-attendance on waiting times had not been sufficiently taken into account:

*"Yes, it was voluntary in a sense that they weren't forced to go. So I think the assumption was made that everyone who would be referred would take the service up. Why wouldn't they?... there were no planned assumptions built into people not turning up." Stakeholder, Area A*

On average the attendance rate in the West Midlands was 58 per cent between September 2008 and July 2009. Attendance rates range from 55 per cent to 64 per cent. We were not provided with any data for the East or South East region about attendance rates.

One area in the West Midlands provided the data shown in Table 4.7. There is some evidence to suggest that waiting times may be linked to attendance rates, with worse attendance rates for customers who have to wait longer than ten days and better attendance when customers have shorter waits between when they are referred and their appointment.

Table 4.7 Attendance by waiting times (October 2008 to July 2009)

Waiting time (days)	Total Clients	Attended	Not attended	FTA rate
1 to 5	44	22	22	50%
6 to 10	135	57	78	58%
>10	334	107	227	70%

*Source: Subcontractor in the West Midlands*

However, when data for attendance rates across the whole of the West Midlands region is plotted against waiting times (as detailed in the May 2009 report to the Regional Implementation Board), there is no clear cut relationship. People who have waited longer for an appointment are no more likely to fail to attend than those who have waited on average less. For example, as of July 2009, Birmingham and Solihull, an area with waiting times rated as 'red', had an attendance rate of 62 per cent, while Coventry and Warwickshire, an area with waiting times rated as 'green', had an attendance rate of 55 per cent.

This suggests that other factors are more important in determining whether or not someone attends their appointment. Interviewees felt that the majority of customers did not know what they were going to do at the **nextstep** appointment. In some areas, advisers rang the customer prior to their appointment, to introduce themselves to explain the service and its benefits and to stress that the service was in demand. Steps like this were reported to be helpful to increase customer's understanding of the **nextstep** service and the potential benefits of attending.

Observations of 13 week and 26 week interviews at Jobcentre Plus supported this finding. Variation was noted in the amount of time taken to introduce and explain the **nextstep** service to customers that were referred as part of the IES trials. One adviser undertaking 13 week review meetings spent 1-2 minutes referring to **nextstep** in one appointment and 15 minutes referring in another.

In recognition of the time constraints on Jobcentre Plus advisers in their review meetings, one stakeholder in the East region explained that, **nextstep** had developed an appointment card and A5 leaflet which would be given to referred customers, to try to increase attendance rates. The leaflet explained to customers why they had been referred and what the **nextstep** service would entail.

Stakeholders in all areas discussed trying to coincide customer's **nextstep** appointment with their sign-on days to reduce travel time and cost for customers. However, this was not always possible, for example if advisers were partially co-located. This, of course, has implications for waiting times – customers may have to wait longer, but this was felt to be off-set by the extra convenience of combining the **nextstep** appointment with a sign-on day.

One stakeholder felt that Jobcentre Plus might be able to alert **nextstep** if the situation of a customer they have referred changes, for example if they find work between their referral and appointment or are no longer claiming benefit. However, given the frequency of sign-on appointments, it would only be of use where waiting times were longer than the five day target.

Where customers did not turn up, several advisers in all regions described how they worked with Jobcentre Plus advisers and encouraged them to refer customers straight away, for walk-up appointments (either as part of the IES trial, or for other **nextstep** services). This kept the waiting time down for the customer and also filled adviser's time. One adviser in the Area B said:

*"We do see non-IES clients to fill the gaps and the Jobcentre are really proactive about if someone doesn't turn up then they will fire someone through that is in the Jobcentre and needs help".*

## Conclusion

Many inter-linked factors contribute to the length of waiting times in the IES trials. Waiting times are not solely due to the relationship between the number of **nextstep** advisers to referrals, but also the number of appointments they have for the IES trials, the time they have in Jobcentre Plus offices, their flexibility to respond to peaks in the number of referrals (both over time and within specific offices), and attendance rates. All these issues present a challenge for **nextstep** to provide a responsive service as part of the IES trials.

Other challenging factors include the general level of referrals, which can be affected by both local labour market conditions (the West Midlands has the highest unemployment rate nationally), and adviser awareness and willingness to refer (referrals were reported to have dropped significantly in IES trial areas in the East and South East).

Waiting times for the **nextstep** service as part of the IES trials need to be examined in the context of the demands placed on the Prime Contractor and subcontractors by the main **nextstep** contracts. Many of the interviewees felt that the services they offered, and the clients they served as part of IES trial were not significantly different to those under the main contract. The Skills Health Check diagnostic tool was not always used and in addition advisers frequently commented that the customers they were referred under IES were the same group that were signposted. This raises questions about the merits of prioritising waiting times for the IES trials over other service delivery.

Similarly, Jobcentre Plus advisers were unclear of the distinction between IES provision and mainstream **nextstep** provision. To prioritise IES customers and reduce waiting times for them would in effect require advisers to prioritise one group of Jobcentre Plus customers over another. There is some evidence that the demands placed on Jobcentre Plus advisers, particularly by the increase in claimants caused by the recession, has meant that sign-posting customers to **nextstep** is more time efficient than referring them through the IES trial, as this involves paperwork. If IES referrals are to be prioritised, further thought needs to be given to how the IES and non-IES provision is differentiated, both to customers, **nextstep** and Jobcentre Plus advisers.

Stakeholders reported being constrained in their ability to increase adviser numbers to meet demand for the **nextstep** service offered as part of IES in part because of a **lack of suitably qualified advisers**, but most commonly because of the **output-based funding model** which combined with lower than anticipated **attendance rates** to mean that most contractors were running the contract at a loss.

The funding model was reported to prevent subcontractors investing in additional staff capacity to meet demand, and therefore reduce waiting times, because of the level of financial risk. Many sub-contractors reported that they had made a loss from the IES component of their contracts to date, due largely to the high failure to attend

rate. Subcontractors are paid for every appointment they undertake. There appears to be a greater incentive to take on non-IES work because it can lend itself to group work and the clients were reported to be more likely to attend. If IES referrals are to be prioritised in order to reduce waiting times, some sort of 'premium' may be required to make the contract viable.

In some areas there was a **lack of premises**: either Jobcentre Plus offices or other suitable community venues. Where sub-contractors did not have their own accommodation the costs of venue hire was reported to be unviable based on the current funding model.

The **number of sub-contractors** in the East and South East areas, combined with the fact that they could 'borrow' advisers from other nearby areas that were not part of the trial to meet demand, created greater flexibility in how adviser time was managed than in the West Midlands. The options to increase capacity were more limited in the West Midlands because of the smaller number of sub-contractors and because the trials cover an entire region.

There is a variety of good practice via which **nextstep** are trying to reduce waiting times. These include **managing adviser time flexibly** to increase adviser capacity in areas with longer waiting times and 'borrowing' advisers from other areas within the region or other sub-contractors to cover annual leave or to target specific waiting times. Where customers have not attended advisers liaise with Jobcentre Plus advisers to promote the use of **walk-up appointments**. **nextstep** are guarding against failure to attend by **reminding customers of their appointments** and reducing appointment times or using **spider booking** to minimise loss of adviser time and revenue caused when customers fail to attend. Advisers also reported **increasing the number of appointments** by providing early evening and Saturday appointments to meet peaks in referrals.

If the number of referrals stays relatively constant, decreasing waiting times will rely mainly on reducing failure to attend rates and increasing the capacity of **nextstep**. This is not without risk, as the demand for the service and number of referrals may decrease when the labour market picks up and employment increases again. Below are a number of suggestions for how **nextstep** could seek to reduce waiting times.

### **Increasing adviser capacity and flexibility**

- Increase the number of sub-contractors in the West Midlands so that the demands for increased capacity required as part of the IES trials can be met across more organisations and the risks associated with employing more advisers shared.
- Consider wider use of flexible advisers, working over many sites and whose diaries are not booked in advance, but who are brought in at short notice where waiting times are at risk of becoming too long.

- Consider increasing the use of temporary workers to cover annual leave periods or trouble-shoot in areas with higher waiting times (if there is a pool of suitably qualified advisers).

#### **Managing adviser time: getting the most from existing staff**

- Wider use of spider bookings by **nextstep** to decrease the negative impact of customers who fail to attend. This may be easiest to operate in offices where there is more than one adviser.
- Jobcentre Plus could inform **nextstep** of likely peaks in 13 and 26 week reviews, based on the on-flows to Jobseeker's Allowance. This would give **nextstep** some advanced notice of the possible peaks in referrals resulting from these review meetings so they could plan staffing levels accordingly. Although referral volumes can't be predicted on a week by week basis, any way in which the number of referrals can be predicted would be helpful for **nextstep** to plan resources.
- Wider use of booking Saturday and/or early evening appointments in areas where waiting times are longer than required.

#### **Increasing attendance rates**

- The content of reminder text/or call to customers should set out the purpose and value of the appointment and state that waiting times are high and to let advisers know if they do not want to / cannot attend. Calls from advisers may be most effective.
- In recognition that Jobcentre Plus adviser time with customers is limited in appointments, **nextstep** could produce a short leaflet for the adviser to give to customers outlining why they have been referred, what the **nextstep** service will involve and the potential benefits of the service.

#### **Meeting premises requirements**

- Increase the understanding of **nextstep** staff that they can meet IES trial customers outside of Jobcentre Plus premises, although implementing this must be balanced with the benefits of co-location and their capacity to then deliver other **nextstep** work.
- Jobcentre Plus to inform **nextstep** of extra days in which they could co-locate, for example, when Jobcentre Plus advisers are on leave or training courses.
- Consider whether **webcams or other technology** could be used to conduct appointments with customers in rural and remote locations and to meet demand from areas where there are only a few referrals, which can make permanent co-location less viable. For customers with sufficient internet skills, there may be scope for advisers at the Careers Advice Service to carry out Skills Health Check appointments over the phone. This would also be an extra pool of advisers to draw on when referrals are high, as well as ensuring the service could reach rural areas and customers in areas with lower levels of referrals most cost effectively.

#### **The funding model**

- Examine the funding model for sub-contractors to assess the extent to which this prevents them from renting premises to deliver the **nextstep**

service and/or recruit more advisers. We understand that there is some research being undertaken currently about this issue and there may be recommendations stemming from this.

Although **nextstep** can take steps to try to reduce the waiting times, it is worth also considering whether the five day waiting time target is suitable for this operational model, and whether it fits with what customers want. It may be more convenient for customers to attend **nextstep** appointments on their signing-on day (likely to be two weeks from when they were referred), particularly if a **nextstep** adviser is co-located on that day. A slightly longer waiting times target would also give **nextstep** more time between the referral and session to plan staffing levels. However, any change to the waiting times target would need to be considered in the context of the customer service standards for the **nextstep** service as a whole. As discussed earlier, Jobcentre Plus customers make up a high proportion of **nextstep** clients. If the IES waiting times target was increased then clients who are signposted could be receiving a different level of service to those that are referred.

Finally, as shown throughout the report, there is a lack of consistent data about the extent of waiting times for customers referred by Jobcentre Plus to the **nextstep** service as part of the IES trials. This makes it difficult to assess reliably the areas with higher and lower waiting times and to understand how they vary between regions and Jobcentre Plus offices at any one point and over time. Collecting data for each customer about the date on which they were referred and the date on which their appointment took place would enable waiting times to be monitored, and therefore managed, on a more consistent basis.



