

# e2e

## A Passport for E2E Learners

Guidance for the completion of the E2E Passport.  
The documentation to support the processes of Referral, Initial Assessment, Planning, Reviewing and Recording Learning and Progression in E2E

Version 2 - July 2006

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Annexes 1 – 7 incorporate copies of each document along with detailed guidance notes

## Introduction

This document replaces earlier guidance issued in March 2004 on the E2E Passport. It provides guidance on the use of the E2E Passport within the Entry to Employment (E2E) programme, which was originally developed by the Learning and Skills Council National Office (LSC NO) in consultation with the Connexions Service National Unit (CSNU), the Adult Learning Inspectorate (ALI), local LSCs and providers. This document has been amended and developed following a review of the extension of the Education Maintenance Allowance (EMAs) to E2E.

The updated Passport documentation incorporates the requirements of EMA – specifically the Contract Part 2, which covers the arrangement for bonuses.

The Passport consists of a series of seven documents. The documents together aim to:

- facilitate seamless transition for young people from the Connexions Service and other referral agencies and ensure the sharing of information with E2E providers
- integrate and provide a record of the key learner processes of initial assessment, planning and implementation of individual learning programmes, including the setting of learner objectives and targets, the monitoring and review of progress and the planning and managing of transition beyond E2E

The seven documents are:

- Connexions Personal Adviser Referral Form
- Referral Agency Form (*new*)
- Initial Assessment Summary
- E2E Programme
- Review Record
- E2E Activity Plan
- Moving On Plan

## Use of the Passport

### Use of the Passport is mandatory for all E2E providers and local Connexions Services

Young people should receive copies of their E2E Programme, Review Records, E2E Activity Plans and Moving On Plan. Providers should ensure there are folders for young people to keep these safe in, which will be called their E2E Passport. The PA/Referral Agency Referral Forms and the Initial Assessment Summary should be retained by the provider, along with copies of other documents.

When young people leave their E2E provider, they should be encouraged to take their Passports with them so that they can share them with other work-based learning providers, FE Colleges and/or employers. Providers can pass on copies of completed Passports to other providers with the agreement of the young person.

Where the E2E Passport is used and held electronically the original version of the following documents must be printed, signed and held on file:

- Initial Assessment Summary
- E2E Programme
- Moving On Plan

Subsequent amended versions may be held electronically and therefore need not be signed. The final version must also be printed, signed and filed. Learners' files must be secured by a password or a copy held on computer disk or CD.

For clarity E2E Review Records are to be signed after each review and can either be hand written or word processed and printed. Activity Plans by definition will be different each week and therefore an original will need to be printed each week.

### Local modifications

To ensure that the E2E Passport is used consistently across all E2E providers and Connexions Services local modifications should not be made.

The following however are acceptable:

- Additional information boxes/questions cannot be inserted into any of the Passport documents and no questions can be removed. Providers may however add an extra sheet with other information on if they require any.
- The Passport documents can be formatted to meet the needs of the provider or local Connexions Service. This means that logos can be introduced, types and sizes of fonts can be altered, text boxes can be enlarged or reduced as appropriate, appropriate colour graphics can be added and documents can be professionally printed.

The Passport documentation does not replace the need to maintain awarding body documentation, including assessment plans, where young people are working towards accredited qualifications. Providers offering externally accredited qualifications must be aware of the quality assurance guidelines and requirements accompanying the use of those qualifications. For further guidance in respect of the use of qualifications within E2E programmes, providers and local LSCs should refer to the E2E Entitlement Curriculum (which is being disseminated alongside this documentation).

## ANNEXE 1

# GUIDANCE ON COMPLETING THE CONNEXIONS PERSONAL ADVISER REFERRAL FORM

- 1. Purpose of the document** – This document aims to capture information gathered from a young person by a Connexions Service Personal Adviser prior to referring them to an E2E provider. The sharing of information with the E2E provider should help ensure a seamless transition for the young person. The information recorded on the form should show why the Personal Adviser is recommending E2E as the most appropriate next step for the young person.

E2E aims to support young people to progress on to sustainable provision at level 2, particularly Apprenticeships, or other vocational pathways, or employment with training. The LSC measures E2E providers' performance principally in this way. The scope of achievement for the young person entering and progressing through E2E is from entry to level 1 of the National Qualifications Framework. Some young people may enter E2E with learning difficulties and disabilities or may come into E2E below entry level. The role of E2E for these learners, and their progress and achievement through the programme will need to be carefully monitored. It is the role of the Personal Adviser to determine a young person's suitability for E2E. In deciding if E2E is the most appropriate next step, Personal Advisers will need to consider whether a young person shows the willingness and readiness to engage in learning in order to progress. Young people with high levels of social issues may need intensive support from Personal Advisers and other support agencies to overcome these barriers before they are ready to enter learning.

- 2. Who completes the document** – The Personal Adviser making the referral should complete the document.
- 3. When should the document be completed** – The document will be completed by the Personal Adviser when carrying out initial assessment with the young person. It might be completed at the end of the process, or during the process, and then finally reviewed with the young person at the end.
- 4. Information to be recorded:**

- **Young person's details** – Enter the young person's name, date of birth, Connexions reference number, contact address, telephone numbers, email address and national insurance number.
- **Connexions Service details** – Enter the name of the young person's Personal Adviser, contact address, telephone numbers (mobile telephone number only if appropriate), email address.
- **E2E provider details** – Enter the name of the E2E provider to whom the young person is being referred, a named contact, provider address, telephone numbers (mobile telephone number only if appropriate), email address.
- **Where is the young person now** – Provide a short summary of the young person's current situation, including details of any qualifications and achievements gained any other agencies working with the young person e.g. *Joe left school nine months ago with 5 GCSEs grades at E and F, and has been unemployed ever since. He is currently under a supervision order for a number of car related crimes and working with the Youth Offending Team. He lives in a hostel following a dispute with his father but would like to move into a flat with a group of friends.*

- **Where does the young person want to be at the end of their E2E programme and in the longer term** – Identify where the young person wants to be at the end of their E2E programme and in the longer term i.e. *Joe wants to do a Modern Apprenticeship and become a car mechanic or a joiner.*
- **What action does the young person need to undertake within E2E to help them get to where they want to be and what support will they need** – Enter details of what areas need to be addressed during the young person's E2E programme in order to help them progress e.g. *Sarah needs to improve her basic skills, experience a range of work tasters to help her make an appropriate career choice, and improve her levels of confidence and motivation.*
- **Does the young person have any comments on the proposed referral** – Record any comments, which the young person would like to make in relation to their referral.
- **How long have you been providing this young person with information, advice, guidance and support and how has that been provided** – Record over what period of time you have been engaged in working with the young person and how the support has been provided e.g. *I have carried out three interviews with Jon over a six week period.*
- **How has initial assessment been carried out with this young person** – Record all initial assessment activities carried out with the young person.

Initial assessment is a process of gathering information from a young person regarding their career aims and aspirations, their previous experience and achievements, as well as identifying their learning and support needs. The APIR framework has been designed to assist Personal Advisers in carrying out this process. There are a wide range of methods which can be used to carry out initial assessment with young people which can contribute to the APIR framework including interviews, reviewing written information, formal assessments, self-assessment questionnaires, observed activities and practical vocational activities. Whilst it is not expected that Personal Advisers will use all these, it is important for them to identify what they have done to avoid the provider unnecessarily requesting the same information from the young person.

Unless the young person disagrees, the results of all initial assessment activities should be transferred to the E2E provider, by attaching them to the form. These will be used by the provider to identify what further initial assessment is necessary during E2E. If initial assessment results cannot be attached details should be entered of how the E2E provider can view or discuss them.

If the young person has been recruited directly by the E2E provider it may be appropriate for the Personal Adviser not to have carried out a detailed initial assessment. In which case the provider will need to conduct a full initial assessment.

- **Summary of young person's details** – Record a summary of information gathered from the young person under the four key areas of the APIR Framework (the APIR Framework provides example of the type of information to be gathered under each heading). If the APIR profiling kit is attached this section does not need to be completed.
- **Who will be the young person's Personal Adviser whilst they are on E2E, or if the young person will not have the support of a Personal Adviser please indicate the reasons why** – Enter the name and phone number of the Personal Adviser who will support the young person during their E2E programme in order that the young person is aware of how to contact them. If the young person does not have a Personal Adviser please enter the reasons why.

- **Young person's agreement to the sharing of information** – Ask the young person to sign the form, giving authorisation to share the results of all initial assessment activities undertaken with them. If the young person is not willing to share the outcomes of initial assessment a note should be recorded to this effect and the assessment profile and profiling kit **MUST NOT** be passed on.
  - **Personal Adviser's signature** – Record the Personal Adviser's signature confirming referral to an E2E provider.
5. Personal Advisers are not required to submit a separate Action Plan or an Individual Development Plan for a young person when referring them for E2E. CSNU and LSC have agreed that it is not in the interests of a young person on E2E to be working towards a number of plans simultaneously. Personal Advisers will want to check however that the recommendations that they have identified on the referral form are adequately addressed within other documents within the young person's Passport and appropriate support is provided.
6. ALN/ASN endorsement does not apply in E2E.

# CONNEXIONS PERSONAL ADVISER E2E REFERRAL FORM

## YOUNG PERSON'S DETAILS

Young person's name	Date of birth	CX ref. no.
Contact address		
Postcode		
Telephone (home) Telephone (mobile)	Email address	National Insurance no.

## CONNEXIONS SERVICE DETAILS

Name of Personal Adviser	
Contact address	
Postcode	
Telephone (work) Telephone (mobile)	Email address

## E2E PROVIDER DETAILS

Name of Provider	Name of contact	
Contact address		
Postcode		
Telephone (work) Telephone (mobile)	Email address	Date of referral to provider

## REASONS FOR REFERRAL TO E2E

Where is the young person now?
Where does the young person want to be at the end of their E2E programme and in the longer term?
What action does the young person need to undertake within E2E to help them get to where they want to be and what support will they need?
Does the young person have any comments on the proposed referral?



## RESULTS OF INITIAL ASSESSMENT ACTIVITIES

How long have you been providing this young person with information, advice, guidance and support and how has this been provided?

How has initial assessment been carried out with this young person?

*Please identify any assessment tools, which have been used in carrying out initial assessment with the young person e.g. The Rickter Scale, Kudos, Morrisby Profile, Basic Skills screening, initial assessment or diagnostic assessment? Please attach to this form the results of any assessment activities, which have been carried out with the young person. If copies are not attached, please give reasons and detail how the E2E Provider can view or discuss them.*

Please indicate which of the following have been completed and are attached to this form

**APIR Profiling Kit**             Completed             Attached  
**APIR Assessment Profile**    Completed             Attached

## SUMMARY OF YOUNG PERSON'S DETAILS

Education and employment

Social and behavioural development

Family and environmental factors

Personal health

Who will be the young person's Personal Adviser whilst they are on E2E, or if the young person will not have the support of a Personal Adviser please indicate the reasons why?

Name

Contact telephone number

**I confirm that the information on this form can be shared with any E2E provider (including subcontractors) to help me in fulfilling my future goals.**

**Name of young person**

**Signature**

**Date**

**I refer this young person for E2E**

**Name of Personal Adviser**

**Signature**

**Date**

## ANNEXE 2

### GUIDANCE ON COMPLETING THE REFERRAL AGENCY FORM

- 1. Purpose of the document** – This document aims to capture information gathered from a young person by a supporting referral agency e.g. Youth Offending Teams, Social Services etc. prior to referring them to an E2E provider. The information recorded on the form should show how the referral agency has reached the decision that they believe E2E is the most appropriate next step for that young person. The sharing of the information with the E2E provider should help ensure a seamless transition for the young person.

E2E aims to support young people to progress onto sustainable provision at level 2, particularly **Apprenticeships**, or other vocational pathways or employment with training. The LSC measures E2E providers' performance principally in this way. The scope of achievement for the young person entering and progressing through E2E is from entry to level 1 of the National Qualifications Framework. Some young people may enter E2E with learning difficulties and disabilities or may come into E2E below entry level. The role of E2E for these learners, and their progress and achievement through the programme will need to be carefully monitored. In deciding if E2E is the most appropriate next step, support agencies will need to consider whether a young person shows the willingness and readiness to engage in learning in order to progress. Young people with high levels of social issues may need intensive support from other support agencies to overcome these barriers before they are ready to enter learning.

- 2. Who completes the document** – An appropriate member of staff from the referral agency.
- 3. When should the document be completed** – The document will be completed by the referrer when carrying out initial assessment with the young person. It might be completed at the end of the process, or during the process, and then finally reviewed with the young person at the end.
- 4. Information to be recorded:**
  - Young person's details** – Enter the young person's name, date of birth, contact address, telephone numbers, email address and National Insurance number.
  - Referral agency details** – Enter the name of the referrer, the name of the referral agency, contact address, telephone numbers (mobile telephone number only if appropriate), email address.
  - E2E provider details** – Enter the name of the E2E provider to whom the young person is being referred, a named contact, provider address, telephone numbers (mobile telephone number only if appropriate), email address.
  - Where is the young person now** – Provide a short a summary of the young person's current situation, including details of any qualifications and achievements gained any other agencies working with the young person e.g. *Joe left school nine months ago with 5 GCSEs grades at E and F, and has been unemployed ever since. He is currently under a supervision order for a number of car-related crimes and working with the Youth Offending Team. He lives in a hostel following a dispute with his father but would like to move into a flat with a group of friends.*
  - Where does the young person want to be at the end of their E2E programme and in the longer term** – Identify where the young person wants to be at the end of their E2E programme and in the longer term i.e. *Joe wants to do a Modern Apprenticeship and become a car mechanic or a joiner.*

- **What action does the young person need to undertake within E2E to help them get to where they want to be and what support will they need** – Enter details of what needs to be addressed during the young person's E2E programme in order to help them progress e.g. *Sarah needs to improve her basic skills, experience a range of work tasters to help her make an appropriate career choice, and improve her levels of confidence and motivation.*
- **Does the young person have any comments on the proposed referral** – Record any comments, which the young person would like to make in relation to their referral.
- **How long have you been providing this young person with information, advice, guidance and support and how has that been provided** – Record over what period of time you have been engaged in working with the young person and how the support has been provided e.g. *I have carried out three interviews with Jon over a six week period.*
- **How has initial assessment been carried out with this young person** – Record all initial assessment activities carried out with the young person.

Initial assessment is a process of gathering information from a young person regarding their career aims and aspirations, their previous experience and achievements, as well as identifying their learning and support needs. There are a wide range of methods which can be used to carry out initial assessment with young people including interviews, reviewing written information, formal assessments, self-assessment questionnaires, observed activities and practical vocational activities. Whilst it is not expected that all of these will be used, it is important to identify what has been done to avoid the provider unnecessarily requesting the same information from the young person.

Unless the young person disagrees, the results of all initial assessment activities should be transferred to the E2E provider, by attaching them to the form. These will be used by the provider to identify what further initial assessment is necessary during E2E. If initial assessment results cannot be attached details should be entered of how the E2E provider can view or discuss them.

- **Summary of young person's details** – Please provide any further information that you believe may be useful to share with the provider, in relation to the young person, which has not been captured elsewhere in the document.
- **Will your agency continue to support this young person whilst they are on E2E and if so how** – If your agency intends to continue supporting this young person during their E2E programme please enter the name and telephone number of that person and describe how this support will be provided.
- **Young person's agreement to the sharing of information** – Ask the young person to sign the form, giving authorisation to share the results of all initial assessment activities undertaken with them. If the young person is not willing to share the outcomes of initial assessment a note should be recorded to this effect.
- **Referrer's signature** – Record the signature of the referrer and the date when they are referred.

## E2E REFERRAL FORM

### YOUNG PERSON'S DETAILS

Young Person's name		Date of birth	
Contact address			
Postcode			
Telephone (home) Telephone (mobile)		Email address	National Insurance no.

### REFERRAL ORGANISATION DETAILS

Name of referrer		Name of referrer's organisation	
Contact address			
Postcode			
Telephone (work) Telephone (mobile)		Email address	

### E2E PROVIDER DETAILS

Name of provider		Name of contact	
Contact address			
Postcode			
Telephone (work) Telephone (mobile)		Email address	Date of referral to provider

### REASONS FOR REFERRAL TO E2E

Where is the young person now?
Where does the young person want to be at the end of their E2E programme and in the longer term?
What action does the young person need to undertake within E2E to help them get to where they want to be?
Does the young person have any comments on the proposed referral?

**RESULTS OF INITIAL ASSESSMENT ACTIVITIES**

How long have you been providing this young person with information, advice, guidance and/or support?

Has initial assessment been carried out with this young person and if so how?

Please identify any assessment tools, which have been used in carrying out initial assessment with the young person. Please attach to this form the results of any assessment activities, which have been carried out with the young person, which you are able to share.

**SUMMARY OF YOUNG PERSON'S DETAILS**

Please provide any information, regarding the young person, which you are able to share which will help the E2E provider in appropriately supporting them.

Will your organisation continue to support this young person whilst they are on E2E and if so how?

Name of person providing support  
Contact telephone number

**I confirm that the information on this form can be shared with any E2E provider (including subcontractors) to help me in fulfilling my future goals.**

**Name of young person**  
**Signature** **Date**

**I refer this young person for E2E**

**Name of referrer**  
**Signature** **Date**

## ANNEXE 3

### GUIDANCE ON COMPLETING INITIAL ASSESSMENT SUMMARY

- 1. Purpose of the document** – Initial Assessment will last between two and eight weeks maximum within E2E depending on the needs of the young person. This document aims to provide a summary of the information gathered during the initial assessment process with the young person, in relation to their learning and support requirements. Initial assessment should be a positive experience for young people and should not focus simply on what they cannot do. It should capture the 'starting point' of the young person to their programme and allow distance travelled from this to be subsequently measured. Initial assessment activities by the provider should be designed to complement activities undertaken by the Connexions Service/referral agencies and not simply repeated. Information gathered during initial assessment should be used to identify key objectives for the young person, which will be identified on their E2E Programme document. Relevant information, which has been recorded, on referral documents does not need to be copied on to the provider's initial assessment summary providing the documents are stored together.
- 2. Who completes the document** – This document will be completed by the E2E provider whilst carrying out initial assessment with their learners. It is anticipated that more than one member of staff might input into this process and therefore they may find it useful to initial their specific contributions.
- 3. When should the document be completed** – The document will be completed during the initial assessment process as information is gathered. It will be reviewed as a whole with the young person, at the end of the process prior to the preparation of the E2E programme document.

#### 4. Information to be recorded:

- **Name** – enter young person's name
- **Referral source** – enter the name of the organisation from which the young person was referred or if learner was a self referral
- **Achievements, qualifications and prior experience/ learning** – Enter the results of all known achievements – GCSE subjects if taken and grades, NVQs, GNVQs, Key Skills, CLAIT, youth awards etc.

Identify any previous experience with other training providers or with employers.

- **Learning experience** – Enter which school or college attended, attendance history, information on any exclusions, whether young person has been statemented and type etc. Enter the young person's views on their learning experience e.g. likes/dislikes.
- **Language, Literacy, Numeracy, ESOL and key skills** – Enter the results of any screening, initial assessment, or diagnostic assessment activities completed. Please give as much detail as possible, including levels achieved and specific areas where support is required.
- **Career preferences and suitability** – Enter the results of any vocational assessments or activities undertaken to identify or confirm preferences, work experience, paid or voluntary employment etc.
- **Interests and hobbies** – Enter details of spare time activities including memberships of clubs or teams, voluntary activities etc.

- **Learning difficulties or other support needs** – Enter any identified behavioural difficulties or learning difficulties including the results of any assessments e.g. dyslexia.
- **Learning style** – Enter the young person’s preferred ways of learning and results of any formal assessment activities.
- **Personal and social skills** – Enter details of the young person’s current level of personal and social skills e.g. self-confidence, motivation, appearance and presentation, attendance and time keeping, reliability, decision making, ability to work with others etc.
- **Health** – Enter any physical or mental health problems, which might effect career choice and/or employment, attendance on E2E, known drug or alcohol addiction, whether undergoing any treatment etc.
- **Personal circumstances** – Enter any issues in relation to the young person’s housing situation, any other support agencies with whom the young person is working and nature of support, any care commitments or difficulties with public transport which may effect the times which they can attend training.
- **Other relevant information** – Enter any additional relevant information in relation to the young person.
- **Action and support required** - Enter what action and support is necessary to meet the young person’s identified learning and support needs. This should also include action which the Key Worker will want to take to make use of information such as the learner’s interests and preferred learning style when designing and implementing their learning programme. Some computerised basic and key skills assessments also now automatically generate learning plans to address identified needs and these should be attached.
- **I confirm that I permit the information contained on this form to be shared** – Identify in this section the names of those organisations with which the learner is willing to share the information recorded on the document. Identify any information or organisations that the young person is not willing to share with.
- **Young person’s signature** – Ask the young person to enter their signature.
- **Name and signature of Key Worker** – Enter Key Worker’s signature.
  - **Date initial assessment programme completed** – Enter the date the initial assessment process is finally completed. This will be at least two weeks after and within eight weeks of the young person’s start date on E2E.

## INITIAL ASSESSMENT SUMMARY

<b>Name</b>		<b>Referral source</b>	
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<b>Area</b>	<b>Action and support required</b>
Achievements, qualifications and prior experience/learning	
Learning Experience	
Language, Literacy, Numeracy, ESOL and key skills	
Career preferences and suitability	
Interests and hobbies	
Learning difficulties or other support needs	



Learning style	
Personal and social skills	
Health	
Personal circumstances	
Other relevant information	

<p>I confirm that I permit the information contained on this form to be shared with my Personal Adviser and the following organisations which may help me in fulfilling my future goals:</p>  <p>Please highlight any information, which the young person does not wish to be shared with other organisations specifically.</p> <p>Young person's signature:</p>	
Name and signature of provider's Key Worker:	Date initial assessment programme completed:

## ANNEXE 4

# GUIDANCE ON COMPLETING THE E2E PROGRAMME AGREEMENT

- 1. Purpose of the document** – The E2E programme agreement document aims to set out the young person's individual E2E programme. It will include details on: the young person themselves, those professionals who will support the young person during their E2E programme, the career and progression aims of the young person, the key objectives which will need to be addressed during E2E to ensure that these can be fulfilled, the selected learning modules which will underpin the E2E entitlement curriculum and identify the learning outcomes which will meet the young person's objectives and details of any qualifications, awards and certificates to be gained across the three strands of the programme.

The document also acts as a contract with a young person where they are receiving an Education Maintenance Allowance (EMA) (specifically the EMA Contract Part 2, which covers the arrangements for bonuses). The young person will have already signed the EMA Contract Part 1 on induction to confirm that they will attend their E2E programme and understand the attendance requirements in order to receive the weekly EMA payments.

- 2. Who completes the document** – The document will be completed by the Key Worker with the young person. Other trainers and specialist tutors may well contribute to this process particularly where they have been involved in the initial assessment process and/or are involved in the implementation of the young person's programme.

Connexions Service National Unit and LSC National Office have jointly agreed that the responsibility for confirming a young person's suitability for E2E is the Connexions Service. Personal Advisers therefore need to complete the final section of this form confirming their agreement of the suitability of the young person for E2E and their subsequent role in the implementation of the programme. The document will need to be signed within six weeks of the young person starting E2E. If for any reason this cannot be achieved, the provider should record the efforts, which they have made to secure this.

- 3. When should the document be completed** – The young person's programme must be informed by the results of the initial assessment process and therefore should be prepared with the young person at the end of this period. Initial assessment should be completed within a maximum of six weeks of the young person's start date. Some information regarding the learner's personal details can be entered on entry to the programme.

#### 4. Information to be recorded:

- **The young person's name, address, telephone numbers, email address, date of birth, emergency contact name and telephone number, national insurance number, start date and, if applicable, EMA reference number** – Enter all the required information.
- **Key Worker, Personal Adviser, Placement/work experience, support agency contacts** – Enter names, addresses and telephone numbers of all key contacts who will support the young person during their E2E programme.
- **Young person's career and progression aims** – Enter the young person's career and progression aim e.g. *I want to do an Apprenticeship and work in construction.*

For some young people their choices may still remain unclear at the end of the initial assessment period and they will need to undertake a range of learning activities, which will help them in their choices e.g. a work taster module. If the information changes during the course of the young person's E2E programme, or is subsequently decided, the new details should be added to the form and dated e.g. *Following a two week work placement in an*

*animal rescue centre Sarah now wants to find a full time job working with animals (21-09-2003).*

- **Young person's key objectives during E2E** – Enter the key objectives to be addressed during the young person's E2E programme. These will be based upon the results of initial assessment and represent the key areas that the young person needs to address in order to fulfil their career and progression aims. They might be viewed as the key barriers, which if not addressed, will prevent the young person moving on.

Objectives will need to be simply and clearly expressed, measurable, realistic and achievable. The number of key objectives should be kept relatively small, no more than five, but they must provide a degree of challenge for the young person. Some key objectives may be identified during the course of E2E and will need to be added e.g. if a young person suddenly finds themselves homeless, finding suitable accommodation will become a key priority for them. In this instance, the key objective should simply be added, showing the date at which this was done.

Examples of key objectives might include:

*To improve my numeracy skills from entry level 2 to entry level 3.*

*To undertake a series of work tasters so I can decide what type of job I want.*

To improve my budgeting skills so that I do not have to borrow money from my family each week.

To investigate different options open to me after E2E so that I can make the best choice for me.

*To achieve Key Skills Level 1 in Communication.*

Short-term targets to support the achievement of objectives should be identified in the young person's review documents.

- **Date achieved** – Enter the date when each key objective is achieved.
- **Expected length of time to complete objectives** – Enter the length of time that it is estimated that the young person will need to achieve their objectives. This will be individual for each learner and take account of their starting point to E2E and their progression aim. If this changes during the course of their programme enter the new date and the reasons for the change e.g. this might be due to the fact that the key objectives for the young person have changed.
- **Hours of Attendance** – Enter the agreed number of hours of attendance required each week, it should be remembered that E2E is a full time programme. Planned attendance should be for 30 hours per week. Learners may start by attending for 16 hours per week, but must build this up to 30 hours as soon as possible. As attendance hours increase during the course of their programme enter updated required hours and date of change.
- **EMA Bonus payment details** – Those young people who are receiving an Education Maintenance Allowance may receive the following bonus payments if they have met the terms of the learning agreement:
  - **Agreement of their E2E Passport - £25**
  - **Achievement of two of their key objectives - £25 to be claimed for each achieved\***
  - **Progression into employment, an Apprenticeship or Further Education - £50**

\*We recommend that objectives that will trigger bonus payments are tailored to the individual and spaced throughout the learner's E2E programme, so there continues to be an incentive to remain focused in learning.

- **Learning and support** – Enter the learning modules and support the young person will need to enable them to fulfil their key objectives and achieve their progression aim. The objectives and progression aim will have been identified during initial assessment. Modules might include numeracy, literacy, work tasters, problem solving, job search, independent living skills, budgeting skills, citizenship, confidence building, working with others, vocational training etc. The need for additional learning modules or support may be identified during the course of the young person's E2E programme and should be simply added and dated.

Learning modules should contain simple and clear outcomes for the young person, accredited wherever appropriate, and should be delivered in 'bite-size' chunks to ensure the young person feels a sense of progression. They should also underpin the e2e entitlement curriculum.

- **Start and Completed** – Record the date each learning and support module is started and completed.
- **Additional support activities to be provided from other organisations** – Record support activities to be provided by external organisations which form part of the young person's E2E programme e.g. *external counselling, youth offending tea, support from Personal Adviser.*
- **Qualification, awards and certificates to be achieved during E2E** – Record any qualifications, awards, certificates the young person will aim to achieve during their E2E programme. This will include both NQF qualifications at entry and level 1 and awards in non-formal educational settings.
- **Achievement date** – Record the date each qualification, award or certificate is achieved.
- **Young person's confirmation of the objectives programme and achievements identified for me** – Young person to enter their signature and date confirming agreement of their identified key objectives, programme and achievement outcomes, and that they will attend their E2E programme for the hours agreed.

For those learners in receipt of EMA their signature here is required so that they can receive their EMA weekly payments and bonuses. More detail on the EMA scheme can be downloaded from the EMA website ([www.direct.gov.uk/ema](http://www.direct.gov.uk/ema)).

- **Key Worker's confirmation to provide the necessary support to meet the objectives, programme and achievement outcomes identified** – Key Worker to enter their signature and date confirming their agreement to provide the necessary training and support to meet the objectives, programme and outcomes identified for the young person.
- **Personal Adviser's confirmation of the suitability of the young person for E2E and the role which they will play in supporting them** – Personal Adviser to enter their signature and date confirming the suitability of the young person for E2E and agreement with the objectives, programme and achievement outcomes set for the young person. Personal Adviser to enter a description of the role which they will play in supporting the young person during E2E e.g. *attend fortnightly reviews with the young person and their Key Worker.*

## E2E PROGRAMME AGREEMENT

Young person's name		Date of birth	
Address		Emergency contact	
National Insurance No.		EMA ref. number	
Telephone Nos.		Email	
E2E start date			

Key Worker contact details Name Address  Telephone No.	Personal Adviser contact details Name Address  Telephone No.
Placement/Work experience contact details Name Address  Telephone No.	Support agency contact details Name Address  Telephone No.

Young person's career and progression aims
--

Young person's key objectives during E2E	Date achieved

Expected length of time required to complete objectives:
Hours of Attendance per week:
Bonus payment details:

<b>Learning and Support</b>					
<b>1. Basic and Key Skills</b>					
	Start	Finish		Start	Finish
<b>2. Personal and Social Development</b>					
	Start	Finish		Start	Finish
<b>3. Vocational Development</b>					
	Start	Finish		Start	Finish
<b>Additional support activities to be provided by other organisations</b>					

Qualifications, awards and certificates to be achieved during E2E	Date achieved

I confirm agreement of the objectives, programme and anticipated achievement outcomes identified above and that I will attend my E2E programme for the hours agreed.	
Young person's signature	Date
I confirm agreement to provide the necessary training and support to meet the objectives, programme and achievement outcomes identified above.	
Key Worker's signature	Date
I confirm suitability for E2E and agree with the objectives, programme and anticipated achievement outcomes identified above. YES/NO	
My role in supporting this young person during their E2E programme will be to:	
Personal Adviser's signature	Date

## ANNEXE 5

### GUIDANCE ON COMPLETING THE E2E REVIEW

1. **Purpose of the document** – This document exists to record the progress which the learner has made since their last review against those targets set and recorded at the previous review.

Where the review document is being used during the induction and initial assessment period, prior to the E2E programme document being fully prepared, the targets should relate to induction and initial assessment activities.

2. **Who completes the document** – The document should be completed by the young person's Key Worker. Others who are involved in their programme however will contribute to the review and in agreeing what is recorded.

Copies of completed review documents will be retained by the young person and the Key Worker and other parties involved in the young person's review. This might include employers, Personal Advisers, or staff from other support agencies.

3. **When should the document be completed** – The review document should be completed during the review itself, although each document will be completed over the course of two reviews. The first part of the document focuses on the planning and agreeing of targets for the period up to the next review whilst the second part allows for the specific reporting of progress against them. It is presented in this way to encourage young people to focus upon progression and achievement during their E2E programme.

During the first review the shaded sections of the document will be completed. This will include the young person's name, agreed targets for the period up to the next review and the support required to meet targets, date targets set, date planned for progress to be reviewed, name of personnel involved in agreeing targets, and young person's signature agreeing to the targets. At the following review the remaining sections will be completed detailing the progress made by the learner and the first part of a new review record will be prepared identifying the new targets for the next period.

Within E2E it is anticipated that because of the intensive levels of support required by young people, formal reviews will take place at least once every 2-4 weeks. The actual period will be determined by the needs of the young person however and may vary during the course of their programme e.g. at the start of the programme where there is usually a higher risk of dropping out, these may be more frequent.

4. **Information to be recorded:**

- **Name** – enter the young person's name.
- **Plan No.** – enter the number of the plan. Plans should be sequentially numbered.
- **Agreed targets for the period up to the next review and the help and the support required to meet targets** – record the targets identified to be achieved by the next review and the help and the support that is needed to achieve them.

The targets should represent 'bite size' chunks towards the achievement of the overall key objectives identified in the E2E programme document. Targets should aim to be SMART (specific, measurable, achievable, realistic and time-bound).

*Examples:*

For a young person who has difficulty in attending their E2E programme at the required start time each day and has been a persistent truant at school for the last four years – to arrive at the required time for two out of four activity sessions each week. Jo to be reminded each day to set his alarm clock.

For a young person seeking to develop their numeracy skills at level 1 – Sarah to recognise, write and compare common fractions so that she can understand fractions used in recipes (N2/L1). Jean (basic skills tutor) and Sam (catering tutor) to help her do this.

For a young person seeking to identify an appropriate vocational pathway – Stephen to attend a work placement at Forshaw's Garage for three days each week to decide if he wants to train as a motor mechanic.

- **Date planned for progress to be reviewed** – enter date of next review.
- **Name of personnel involved in agreeing targets** – enter the names of those people involved in agreeing the targets and the organisations, which they are from.
- **Comments on progress against targets including views of learner, Key Worker, Personal Adviser, Employer and others participating in the review** – Record the progress actually made against the specific targets identified e.g. *James arrived three mornings on time during the first week but only once during the second week. When he was late, this varied between one and four hours. James had found it more difficult to get up on time during the second week because his Dad was working nights and not there to get him up. James still needs to develop his ability to arrive at the training centre on time each day.* This might be identified again as a target on the next review with his Key Worker arranging to phone him early each morning.

Comments recorded by young people, Key Workers, trainers and employers on E2E activity plans should contribute to the process of reviewing the progress of the young person.

The E2E Programme document should be updated where there is a need for additional learning modules to ensure the E2E programme is meeting the young person's needs and being delivered within the guidance set out in the E2E entitlement curriculum, and where any objectives have been completed or any qualifications, awards or certificates have been gained, e.g. *David has completed his Youthtrain programme and gained accreditation.*

- **Name of personnel involved in the review of progress** – enter the names of those people involved in the review of progress and the organisations, which they are from.
- **Comments on progress in any other aspects of learning since the last review** – enter the progress the young person has made in any other areas of learning since the last review, which do not relate to the specific targets set. This might include for example unexpected learning opportunities, which had not been planned but occurred naturally.
- **Health and Safety awareness** – Record evidence to show that the young person's understanding of health and safety issues has been checked during their review. Possible questions to ask the young person might include:

*Have you been asked to do anything that you were not trained for, or you thought was unsafe?*

*What training in health and safety have you received at your new placement?*



Record any identified actions necessary.

- **Equal Opportunities awareness** – Record evidence to show that the young person’s understanding of equal opportunities issues has been checked during their review. Possible questions to ask the young person might include:

*Do you think that you have been treated fairly and respectfully by everyone?*

*Is there anything that has happened during the two weeks that has made you unhappy in any way?*

*Do you feel that you have had the same opportunities over the two weeks as other learners?*

- **Young person’s signature and date** – I agree to the targets set for me and will work to achieve them – Ask the young person to enter their signature and the date when the targets are actually agreed.
  - **Young person’s signature and date** – I agree with the comments made about my progress since my last review – Ask the young person to enter their signature and the date when the progress against the targets is reviewed.
5. For those young people who are still on E2E after 6 months, a major review should be undertaken with them to ensure that the programme is meeting their needs and that progress is taking place. For those who reach the 12-month stage of their E2E programme, this process should be similarly repeated. 6 and 12 month reviews should be clearly highlighted on review records by recording this with the review no.

**E2E REVIEW****REVIEW NO:**

<b>Name</b>	
-------------	--

<b>Agreed targets for the period up to the next review and the support required to meet targets</b>	<b>Comments on progress against targets including views of the learner, Key Worker, Personal Adviser, Employer and others participating in the review</b>
Date planned for progress to be reviewed  Names of personnel involved in agreeing targets	Names of personnel involved in review of progress

Comments on progress in any other aspects of learning since the last review

Health and Safety awareness	Equal Opportunities awareness
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I agree to the targets set for me and will work to achieve them Young person's signature Date	I agree with the comments made about my progress since my last review Young person's signature Date
---	---

## ANNEXE 6

### GUIDANCE ON COMPLETING THE E2E ACTIVITY PLAN

- 1. Purpose of the document** – This document exists to support young people in achieving the targets, which have been agreed with them during their last review. It is not intended to be simply a timetable of activities but should focus on the learning outcomes to be covered within the activities themselves e.g. where a learner is on placement in a shop the plan might show – *learn to use the till, complete a stock take*, in basic skills – *learn to do percentages* etc. This should align with and underpin the targets, which have been agreed with the learner.

Tutors' session plans will still need to identify how individual's needs are being addressed within particular sessions/activities. These will also support learners in the achievement of both their key objectives and targets.

The Activity Plan also aims to provide a reflective learning log for the learner.

- 2. Who completes the document** – Ideally the document should be completed by the learner wherever possible in order to help them to take responsibility for their own learning. This should be done in conjunction however with their Key Worker/tutor/employer and not simply assigned as a task for a learner to do on their own. It is acknowledged that in some circumstances learners may not be able to actually fill out the document due to literacy levels or other factors. In such circumstances the Key Worker should fill in the document with the learner.
- 3. When should the document be completed** – Where possible an activity plan should be planned in advance of the week covered by the plan e.g. during the previous week or on a Friday. Where learners are on placement with an employer, it may not be known what each learner is going to be doing or learning each day and therefore the information should be added once known.
- 4. Information to be recorded:**

- **Name** – Ask the young person to enter their name.
- **Plan No.** – Enter the number of the plan. Plans should be sequentially numbered.
- **Date of week commencing** – Enter the date the week commences e.g. 9/02/04
- **What am I going to do today to help me achieve the targets agreed at my last progress review** – Following discussion between the Key Worker and the young person, specific activities should be agreed which will assist the learner in achieving their targets. Ask the young person to record these on the activity plan showing the day when they are going to be doing them e.g.

*Monday - Work with Mick all day on site & learn to seal the glass into the window frames*  
*Tuesday - Attend session on maths & learn to work out the areas of things (like windows)*  
*Wednesday - Back on site learning to sand down frames*  
*Thursday - ASDAN Module day I must finish module 6 so I can move onto Module 7*  
*Friday - Day off as long as I've attended all week on time!*

- **Learner's Comments** – At the end of each session/activity trainers should encourage learners to reflect on their experiences. Useful questions to consider include:
  - What skills have I learnt and used?
  - What have I enjoyed and not enjoyed?

- What have I done well in?
- What do I need help with?

Encourage the young person to record comments on their learning experiences each day wherever possible. This information will help inform both the learner review process and help trainers in planning future learning activities.

Comments from Key Worker, trainer and employer – Ask all those who have contributed to the learner's training programme during that week to comment on the progress of the learner. This will also assist the learner review process.

**ACTIVITY PLAN****PLAN NO**

Name	
------	--

Date of week commencing	What am I going to do today to help me achieve the targets agreed at my last progress review?	Learner's Comments e.g. <i>What skills have I learnt and used?</i> <i>What have I enjoyed/not enjoyed?</i> <i>What have I done well in?</i> <i>What do I need help with?</i>
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		

Comments from my Key Worker, trainer and employer
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## ANNEXE 7

### GUIDANCE ON COMPLETING THE MOVING ON PLAN

- 1. Purpose of document** – All learners who achieve a positive progression should be followed up and supported for at least eight weeks after leaving E2E. This form aims to document both the support arrangements planned and agreed with the young person to cover this period, and to record subsequent activities undertaken.
- 2. Who completes the document** – Ideally this document will be completed by the Key Worker and the Personal Adviser with the young person.
- 3. When should the document be completed** – The document should be completed prior to the young person leaving E2E. It might be completed for example during their last review or on their last day.
- 4. Information to be recorded:**

- **Contact details and date of leaving** – Enter the young person's name; leaving date; contact address; telephone numbers; email address; (you do not need to enter these personal details if they are already captured elsewhere in the Passport) and tick one of the following independent/with family/with friends/other (please specify) to indicate living arrangements.
- **Progression route** – Tick one of the following to indicate positive progression route: Apprenticeship, Further Education and Training, Employment with training; employment only.
- **Personal Adviser employment authorisation** – Where a young person is progressing to employment only, a Connexions Personal Adviser must endorse this as the appropriate next step for the young person in order for the E2E provider to claim a progression bonus. Personal Adviser to enter their name, signature and date when signed.
- **Moving on details** – Enter the name of the company/ provider or college where the learner is progressing to; title of job/programme/course; address; telephone and email details of company/ provider or college; date of start of job/programme.

Ask the young person to confirm whether a copy of their completed E2E Passport can be made available to this organisation and ask them to sign to this effect. Any sections that the young person does not wish to pass on should be noted and removed.

Ask the young person to enter their signature confirming that the job/t programme will be for at least 16 hours or more per week. Additional evidence may also be required from employers/training providers for audit purposes.

- **Details of key person who will provide support** – Enter the name of the key person who will provide support; contact address; telephone numbers; and email address.
- **Agreed support and record of activities**

In the **nature of support to be provided** box identify the arrangements agreed with the young person for providing support including frequency and method where appropriate e.g.

*Megan wants to be telephoned every week to start with, for a chat as to how she is getting on in her new job. The best time to contact her is at home on a Monday evening between 6pm and 7pm.*

*Megan is happy for Jo (her E2E Key Worker and Moving On supporter/mentor) to make contact with her employer and visit every other week in order to offer support.*

In the **support provided and comments** box enter all contact and activities undertaken with the young person and employer/provider/College for at least eight weeks after leaving date.

Record the **date support is provided** and enter **signature** of person who enters information.

- **Signatures** – Ask the young person to sign and date the plan agreeing to the contents. The provider and Personal Adviser should also sign and date the form.
- **Connexions notification** – The Key Worker should sign and enter the date to show when the Connexions Service has been informed that the young person has left E2E. Ideally this should be done either before, or on the learner's leaving date.
- **Situation 8 weeks after leaving E2E provider** – At the 8 week stage tick one of the following to indicate situation of learner: still with provider/employer/College; circumstances changed (please specify where learner is now); unknown.



## MOVING ON PLAN

### Contact details and date of leaving

Young person's name		Leaving date	
Contact address			
Postcode			
Telephone (home)		Email address	
Telephone (mobile)			
Independent	With family	With friends	Other

### Progression route

Employment with training	Modern Apprenticeship	Further Education Vocational Provision	Employment only
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### Personal Adviser employment authorisation (\*where employment only identified above)

I confirm that employment without training is the most appropriate next step		
Name of Personal Adviser	Signature of Personal Adviser	Date

### Moving on details

Name of company/training provider/College	Job title/programme/course	
Address		
Postcode		
Telephone	Email address	Date of start of job/programme/course
I agree that a copy of my completed E2E Passport can be passed on to this organisation YES/NO		
Please identify any sections the young person does not wish to pass on		
Young person's signature		
I confirm that the job/training programme is for at least 16 hours or more per week		
Young person's signature		

### Details of the key person who will provide support for the young person after they have left E2E and who the young person should contact if they need help

Name	Job role
Contact address	
Postcode	
Telephone	Email address
Telephone (mobile)	

**Agreed support and record of activities**

Nature of support to be provided	Support provided and comments	Dates support provided	Signature

**Signatures**

I agree with the information contained on this plan		
Name of young person	Signature	Date
Name of Key Worker	Signature	Date
Name of Personal Adviser	Signature	Date

**Connexions notification**

I confirm that I, the Key Worker, have informed the Connexions Service that this young person has left E2E	
Signature of Key Worker	Date Connexions informed

**Situation 8 weeks after leaving E2E provider**

Still with provider/employer/College	
Circumstances changed (please specify where learner is now)	
Unknown	

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