Be Well Community Learning C.I.C.

Compact Report V7
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The **matrix** Standard is delivered by The Growth Company
on behalf of the Department for Education.
Email: matrixStandard@growthco.uk   Phone: 01423 229665

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Assessment Information

Assessment Type	Initial Assessment
Assessor's Decision	Standard Met
Assessor's Name	Kathy Leahy
Visit Date	08/08/2023
Client ID	C35278
Assessment Reference	PN202066
Continuous Improvement Check Year 1 due by	08/08/2024
Continuous Improvement Check Year 2 due by	08/08/2025
Accreditation Review onsite visit to be conducted by	08/08/2026

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Organisation – Introduction, Aims, Objectives and Outcomes

Be Well Learning Ltd was established in 2019 by the current Director who has a background in health and social care, who recognised the need for mental health awareness training not only for individuals but also for people supporting those with mental health challenges ie the health and social care workforce. The organisation was originally set up as a limited company, but to access grant funding they have established a community interest company (C.I.C.) and it is the C.I.C. that is the subject of this assessment.

Their intention is to engage with their local community and businesses to have a better awareness of their own and others mental health, in order to prevent poor mental health and to promote good mental wellbeing. This purpose is put into action through the delivery of a variety of training programmes; these are typically short courses from a five hour programme delivered in a single day to eight hours delivered over four weeks.

They set out their vision as: '*To provide skills and knowledge to our community around a wide range of disabilities including mental health issues. Loneliness, isolation and poor mental health will be alleviated, learning and connection will be the catalyst for this change. To be able to provide evidence of the impact that our courses are having on our local community.*'

With values of Inclusive, Encouraging, Determined, Empathetic and Authentic.

Partners commented: "*Exemplary performance", It's a trusted partnership", "A level of expertise that is quite unique", "We are in the same line of work in trying to make the world a better place for people with mental health challenges, it's the synergy that works well*".

The organisation's information advice and guidance (IAG) policy sets out the objectives of the support as:

- To ensure that all stakeholders receive consistent and up-to-date information about our programmes.

- To provide accurate and evidence-based advice.

- To offer guidance to potential learners and organisations in choosing the most appropriate training based on their needs.

Initial IAG may be provided to individual learners who are enquiring about an 'open' course or may be provided to organisations where a course is being delivered to a group of that organisation's clients/service users or staff/volunteers. The organisation engages with different community organisations who may have individuals who may benefit from the training courses on offer to discuss the options available and consider the suitability for the potential cohort. Staff explained that for some groups, course content is adjusted to ensure that it meets the needs of the delegates through an exploration of their needs. For individuals enquiring about open courses, staff have telephone contact to explore their needs and the suitability of the course to meet them.

For both types of programmes, course overview leaflets are provided that give an outline of the overall purpose, course content and structure/timings. A course booking form helps to capture any additional learning or access needs and the enrolment form for the funded training programmes sets out people's reasons for attending e.g. to improve employment prospects, intention to volunteer or gain community involvement, to move onto further learning, to gain skills. Although information is captured, it is recognised that further work could be undertaken to use this data to inform future planning.

"They were keen to guide me into those areas that were applicable to me. They were able to understand my needs very quickly." (learner)

As noted above, courses are relatively short in length and therefore this initial IAG is the main area of discrete IAG delivery. Other information is embedded within the learning programmes, for example an exercise within the Small Changes Big Impact programme is for delegates to develop their own action plan of how they are going to use the information/knowledge they have gained and take things forwarded. This is a facilitated session to support progression.

"It was one of the best courses I have ever attended – lived experience, passionate, clear, well-balanced, well delivered, a lot of information. It made an immediate difference." (learner)

It is recognised that IAG contributes to the achievement of learning objectives, by ensuring the right people are on the right programme, at the right time for them. A recent report for a funder showed that all learners who started the programme remained on programme and achieved all of the learning objectives.

Although course achievement is the ultimate goal, staff spoke of the client journeys in terms of the steps and achievements in these journeys, often citing confidence in themselves or to address situations. Some of the feedback activity also captures some client outcomes, for example the Emotional Resilience and Wellbeing evaluation survey showed that 90% of recent delegates were inspired to make life changes.

As a small organisation, many of the processes are informal, for example quality assurance. Although these processes currently work well, should the organisation grow they may find that they need to introduce more formal processes. However, this is an organisation that is valued for their approach and knowledge.

Strengths

A number of strengths were identified during the assessment, which are detailed below. The numbers in brackets refer to the element and criteria of the **matrix** Standard.

- The organisation is relatively new and a small niche training provider. However, they have already established a strong networking approach that has enabled them to be involved in policy discussions, along with supporting grass roots organisations' staff, volunteers and client groups. (1.8)

- Despite being a very small organisation, they have been invited to be part of a delivery model for a large national training development and delivery project. This is a testament to their reputation and approach in their area of delivery; they are clearly 'punching above their weight'. (1.2, 2.1)

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Areas for Development

Areas for development are offered in the spirit of continuous improvement and a way for an Assessor to add value e.g. where the service is of a high quality, development areas are offered to help the service be even better than it already is, or to give insight into practices seen elsewhere. There is no correlation between the number of strengths and areas for development. Where development areas are greater in number this is not intended to indicate that the information, advice and guidance service is in any way lacking. These will form the basis for discussion at the Continuous Improvement Checks (CIC) conducted twelve and twenty-four months from the date of this Assessment, along with any other notable developments. The numbers in brackets refer to the element and criteria of the **matrix** Standard.

- Staff described how they engage with community partners and potential learners. The revised **matrix** Standard requires organisations to have 'an openly available' description of their IAG offer and identifies some of the information that could be included:

  - the nature of the IAG available throughout the recipient's journey
  - how the IAG is tailored to recipient needs
  - who will be involved its delivery
  - the recipient groups to be supported and any eligibility criteria
  - the intended benefits for recipients
  - any key partnerships
  - feedback mechanisms (including complaints procedures)

  Having a full description of the IAG offer may provide potential clients an opportunity to review what is on offer and whether it may be the right service for them. (3.1)

- Each of the courses delivered are relatively short in duration and therefore the IAG related to the programmes is limited to course information and signposting to other provision. In order to further capture the impact of the IAG and support provided, the organisation may wish to consider distance travelled tools which could capture a 'before and after' picture. Examples could include the Warwick Edinburgh scale:

  https://warwick.ac.uk/fac/sci/med/research/platform/wemwbs/ or Outcome Stars: https://www.outcomesstar.org.uk . Some organisations have also developed their own distance travelled tools. Capturing this self-reflection could help to identify the impact the support has had on individuals. (1.5, 4.2)

- The analysis of feedback focuses on responses that refer mainly to the training programmes, for example '*how would you rate the trainer?*'. Although the IAG is implied in some of the response areas, the organisation should consider how they explicitly capture feedback on the IAG received in order to get a clearer insight into the learner experience. (4.3)

- As a small organisation, quality assurance is mainly through review of learner feedback and informal review. The organisation should consider all of the monitoring and evaluation information they need to ensure there are comprehensive quality assurance in place to help inform future practice.

  In the revised **matrix** Standard that was launched in May this year, it asks organisations to develop an 'evidence base' to support quality assurance, review and evaluation activity and includes the following areas:

  - impact and outcome data
  - feedback from recipients of IAG, staff and other organisations/networks

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- quality assurance activities of promotion, delivery (including where appropriate observation of person-to-person delivery), digital and non-digital resources
- understanding of the external environment and any proposed changes on the horizon
- the benefits of digital, non-digital and blended delivery
- the benefits of working with other organisations and how they contribute to recipients' experiences
- learning from other assessment and self-assessment processes
- feedback from oversight arrangements

The guidance to the revised **matrix** Standard states that '*Your assessor will be looking for a range of evidence that has helped you build a picture of what is working well and what could be improved. It is unlikely that one source of evidence will be sufficient to demonstrate you have effectively evaluated your IAG.*' The organisation may wish to consider how they collate and use this range of information to support continuous quality improvement. (4.5)

- The organisation recognises that they need to capture more of the activities they are undertaking. Some organisation source or develop their own management information systems in order to capture a range of information that meets their needs and the differing needs of other organisations such as their funders. Having systems that are sufficiently flexible to develop a range of reports can be valuable in presenting the impact of the work undertaken to funders and potential funders. (2.1)

The annual **matrix** Continuous Improvement Check will allow the organisation to demonstrate on an ongoing basis the developments they are continuing to make in order to support individuals. These may include the Areas for Development above. https://matrixstandard.com/assessment-journey/continuous-improvement-checks/

Please note that annual Continuous Improvement Checks are mandatory and non-completion within the required timescale will impact on your organisation's accreditation, please see the section Assessment Information for dates.

Methodology

The following methods were used to gather evidence against the **matrix** Standard during the assessment process.

The assessment was conducted remotely using Zoom and telephone contact. The organisation also provided access to documents through a Sharepoint link.

Staff	Interviews with 2 staff
Clients	Interviews with 6 clients
Partners	Interviews with 3 partners
Document review	Website, Strategic Plan, IAG Policy, Case Studies, Feedback Reports, Funder Outcome Information, Course Workbooks, Learner Paperwork

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Conditions of Accreditation

Holders of the **matrix** Standard Accreditation must:

1. Maintain and continually improve upon their services.

2. Throughout the period of accreditation satisfy The Growth Company that the organisation continues to meet the requirements of the **matrix** Standard via the annual continuous improvement checks and the three-year accreditation review.

3. Complete annual continuous improvement checks in a timely way, it is expected these will be carried out annually by the accreditation anniversary date.

4. Inform The Growth Company or their Assessor if the key contact name/contact details change.

5. Submit their Booking Form for re-accreditation to the **matrix** Standard at least 3 months prior to the accreditation anniversary date ensuring all pre on-site activity is completed in a timely way including planning, payment and interview scheduling. Accreditation Reviews are due 3 years from the anniversary accreditation date; it is expected that organisations will be assessed by this date or will risk being de-accredited.

6. Inform The Growth Company of any significant changes made to the organisational structure, senior management or systems that may impact on their accreditation; email: matrixStandard@growthco.uk.

7. Inform The Growth Company immediately if they wish to extend or reduce the scope of their accreditation.

8. Inform The Growth Company of any serious complaint or rise in numbers of complaints received (within the scope of the accreditation).

9. Not undertake or omit to undertake any activity that may be misleading and/or may cause The Growth Company and/or the **matrix** Standard to be brought into disrepute.

10. Only use the **matrix** Standard Quality Mark for the areas within the scope of the accreditation and in accordance with the guidelines. For example, if a certain department is successfully **matrix** accredited, the Quality Mark can only be used on that department's letterhead or on that department's page on their internet homepage.

11. Ensure in cases where accreditation is withdrawn or where they do not come forward for accreditation review, remove from display any certificates or plaques issued by The Growth Company and do not display the **matrix** Standard Quality Mark nor refer to be a former holder of the **matrix** Standard.

12. Be aware that The Growth Company reserves the right to remove any accreditation and/or certification previously applied if payment is not received for services provided.