



You are Valued

Evaluation Report

Funded by  **COMMUNITY**
FUND

July 2024

This evaluation report has been undertaken by **Infotrain**
on behalf of **PBIC**

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In memory of our colleague **Rob Burton**

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1. INTRODUCTION

1.1 PBIC

PBIC is a Bedford based charity that provides support to locally based migrants mostly originating from Central and Eastern Europe. PBIC supports over 2,600 clients a year.



Helping migrants settle, achieve and contribute

Further details on PBIC can be found in **Section 2** of this report.

1.2 You are Valued

In January 2020 PBIC was awarded a **grant of £499,346** by the National Lottery Community Fund (under its Reaching Communities funding stream) for a work project to support people from EU communities living in the UK. The funding was for 5 years from March 2020 to March 2025. This funded work was branded as “You are Valued”.

In 2022 an application for further funding was made to the National Lottery and an **extra grant of £123,542** was awarded bringing the total grant for the 5 years of work up to **£622,888**.

Further details on the **You are Valued** work can be found in **Section 3** of this report.

1.3 Evaluation of the funded work

The final year of the National Lottery Community Fund grant begins on 9th March 2024. PBIC has commissioned this report to evaluate the success of its work over the Years 1-4 of the grant, and to help plan Year 5 of the grant.

The 5-year funding is due to end on 8th March 2025. This report will therefore provide a very good indication of the successes and learning points from 4 years of the National Lottery funded work at PBIC. It is hoped that the recommendations from this evaluation can also be put into place to help PBIC develop and enhance its future work. The report can also be used as evidence to support the further funding applications to the National Lottery Community Fund, or for other funding.

PBIC appointed **Infotrain**, an independent consultancy company which specialises in supporting the local voluntary and community sector, to conduct this evaluation. The work on the evaluation has been led by Infotrain’s Director, Len Simkins.

Evaluation – Timetable

- July 2023**
- Infotrain appointed by PBIC
 - Initial meeting with PBIC CEO and Chair of Trustees
- August 2023**
- Background reading on PBIC and the work funded by the Community Fund
 - Planning meeting with PBIC CEO and PBIC Chair
- September 2023**
- Briefing meeting with PBIC Project Manager
 - Collation of PBIC reports and statistical data from PBIC activities
- October 2023**
- Design of format for evaluation report
 - Initial design and drafting of evaluation report - Section 1 (Introduction) and Section 2 (PBIC – General Information)
- November 2023**
- Observation of PBIC input at the Trustees Network Meeting at the CVS in Bedford
 - Meeting PBIC team and observation of Team Meeting
 - Two detailed meetings with PBIC Project Manager
 - Observation of PBIC Reception work
 - Various interviews with individual PBIC staff
 - Review meeting with PBIC CEO
 - Drafting of surveys for PBIC staff and trustees
 - Observation of advice interviews at PBIC
 - Observation of ESOL group session
- December 2023**
- Meeting with PBIC Chair
 - Meeting PBIC trustees and observation of Trustees' Meeting
 - Attendance at, and observation of, PBIC Public AGM
 - Visit to PBIC Christmas party
 - Collation of various evidence for evaluation report – including: PBIC publicity documents; feedback from users, staff, and trustees; case studies; and photos.
- January 2024**
- Discussions with PBIC external stakeholders
 - Drafting of Evaluation Report – Section 3 (Details of PBIC's YAV work); and Section 4 (Evaluation of PBIC's YAV work).
- February 2024**
- Meeting with PBIC CEO and PBIC Chair to discuss draft Evaluation Report and provisional conclusions and suggestions for consideration.
 - Deadline for submission to Trustees was set for May
- May 2024**
- Completion of Evaluation Report - including Section 5 (Conclusion and suggestions for consideration).
 - Submission of final draft of Evaluation Report to PBIC
- July 2024**
- Final amendments made with an update (Appendix 1)
 - Submission of final report to PBIC

This evaluation mainly concentrated on the work done in 2023, in the 4th year of the You are Valued project. However, in the evaluation I also considered the cumulative data for work done in the first 3 years of the project.

Details on the **evaluation methodology** used, and the **evaluation findings**, can be found in **Section 4** of this report.

The **conclusion** from the evaluation, and a **list of suggestions for consideration**, can be found in **Section 5**.

The initial draft of the evaluation report was completed in February 2024. Due to the delays in presenting the final report to the PBIC Trustees, an update since the initial draft of the report has been added in an **Appendix** to this report (in July 2024).

1.4 Acknowledgements

Thanks should be given to various people who have helped with this evaluation including:

- **PBIC Trustees** – I had two introductory meetings with Nigel Rees (Chair of the Trustee Board), with Mags Brady (PBIC CEO), in summer 2023. I also had an in-depth, individual meeting with Nigel in early December. I later attended, and observed, a PBIC Trustee Meeting on 17th December. The meeting was attended by 6 trustees (Nigel Rees, Gemma Chiarini, Gordon James, Moritz Lank, Tom Leydon, and Sandra Turner) and by Mags Brady (PBIC CEO and Company Secretary for PBIC). 5 trustees also sent me completed survey forms that had been circulated to the PBIC trustees in December. Nigel also sent me feedback about the draft Evaluation Report submitted in May 2024.
- **PBIC staff** – I initially had two introductory meetings with Mags Brady (PBIC CEO), with Nigel Rees (PBIC Chair), in summer 2023, followed by a briefing meeting with Rob Burton (Project Manager) in September. I later had an in-depth individual meeting with Mags (on 22nd November) and 2 in-depth meetings with Rob (in November). I also met the staff team at a PBIC team meeting on 13th November, which was attended by Mags (CEO), Rob (Project Manager) and 9 other PBIC staff. Also in November I had shorter individual meetings with the following 7 staff: Tetiana Vodopian, Alina Wesner-Cyrankowska, Rob Brady, Tetiana Trotsenko, Kaja Juda Kawulicz, Monika Rylance, and Domenika Pawlik. I also observed the work of the Senior Adviser (Monika) on 30th November, and one of the ESOL tutors (Dominika) on the same day. 14 members of staff also sent me completed survey forms that had been circulated to PBIC staff during the evaluation.
- **PBIC clients** – On 30th November I observed **2 PBIC clients** (Mr N. and Mrs. B.) being interviewed by Monika Rylance (Senior Adviser). And on 30th November I also observed **15 PBIC learners** being supported and assessed by Domenika Pawlik (ESOL tutor) at an ESOL assessment session.
- **External PBIC stakeholders** – On 29th January I met with David Brewer (Bedfordshire CVS) to get his feedback on working with PBIC.

At **Infotrain**, thanks also go to **Anna Kalachynska** who provided some administrative support on the evaluation work.

2. PBIC - GENERAL INFORMATION

2.1 Overview and history of PBIC

PBIC was set up in 2007 initially to provide support to Polish migrants to help them integrate in the UK.

The original name of the organisation was **The Polish British Integration Centre** (PBIC) but from September 2020 the organisation has simply been called **PBIC** to reflect the fact that over the years PBIC's remit has expanded to provide support not just to Polish people but to other migrant communities mainly, from Central and Eastern Europe.

PBIC has now been operating for 17 years and has become a well-established, and well-respected local charity.

As the organisation grew it moved into its first office space in 2009 at the Polish Club on Alexandra Road in Bedford. Then, in 2010, receipt of its first European Social Fund grant enabled PBIC to move to larger premises, with classroom facilities and separate advice rooms, next to the Place Theatre on Bradgate Road, Bedford. Extra office space was later used in Lurke Street in the town centre, before a consolidated move was made in 2020 to **premises** at 90-92 Bromham Road, Bedford MK40 2QH.

The office space is all on one floor and is accessible to people who have a disability.



PBIC has been a **registered charity** since 2013 (Charity No. 1152448).

The organisation is also a **Company Limited by Guarantee** (Company No. 06632086). The Company was first incorporated in 2008 as Polish British Integration Ltd, and it then changed its name to PBIC Ltd in June 2020

PBIC holds the **Matrix quality accreditation** for its careers information, advice and guidance service, and has recently been awarded the Office of the Immigration Services Commissioner (**OSIC**) **qualification (Level 1)** for its immigration advice service.

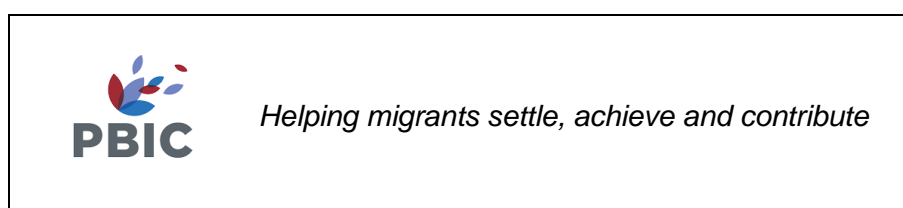
PBIC is a member of **Advice UK** and of the **Career Development Institute (CDI)**.

2.3 Vision, mission, objects and ethos

In its Annual Report for 2022/23, PBIC's **vision** was confirmed as:

“A society in which migrants can appreciate the values and challenges of life in the United Kingdom and in return feel empowered to give their input to create a culture of understanding and success.”

PBIC's associated **Mission Statement** is: “Helping migrants settle, achieve and contribute”. This mission is sometimes used in PBIC's publicity documents alongside its logo.



PBIC's **Objects** as a charity, and as a company, are stated in full in its amended Articles of Association, which were adopted in July 2023.

In summary, these objects are **to support migrants, primarily from Central and Eastern Europe, living in Bedfordshire** by:

1. **Preventing and relieving poverty** through the provision of support services on health, housing, employment, education, career development and other relevant issues
2. **Promoting education** through:
 - education and training in the English language and British culture
 - further education in different subjects to support their education, career development, and entry into the labour market
3. **Promoting social inclusion** by providing:
 - advice and support to understand the social and legal framework of the UK
 - education and training in the English Language and vocational skills
 - social and recreational facilities and events involving the local community
4. **Promoting Polish culture and heritage** to the wider British society

In various documents (both internally and in those used externally) PBIC stresses its **supportive nature and ethos**.

For example, in PBIC's general publicity leaflet it states that:

“PBIC believes in treating everyone who uses our services with fairness and respect and all our services are confidential”

In PBIC's Service Agreement for clients it confirms that PBIC is committed to:

"Provide a supportive service, showing sensitivity and respect"

"Treat you fairly, regardless of who you are"

Then, in both PBIC's Office Manual (2023/24) and its ESOL Manual (2023) it is stated that:

"Our services aim to empower and encourage individuals to become independent, allowing them to take ownership of their issues, understand their rights and the systems that govern the communities in which they live"

"PBIC provides free, independent, confidential and impartial information, advice and guidance to residents of Bedford, Luton and Central Bedfordshire and surrounding areas, on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination."

"The service aims to provide the information, advice and guidance people need for the problems and issues they face."

And also in PBIC's recent proposal for a new client support model it states that:

"At PBIC clients know they will be given enough space and time and be dealt with by advisers who are kind and open."

2.4 Migration from Poland and other countries in Central and Eastern Europe

PBIC supports migrants who have primarily come to Bedfordshire from Central and Eastern Europe.

Migrants from Eastern Europe and their descendants have been present in the United Kingdom, in small numbers, for several centuries. But there have been much larger arrivals at different times in the 20th and 21st centuries.

The 1901 Census recorded 96,613 Eastern Europeans living in Great Britain. But later, in the aftermath of World War 2 approximately 80,000 Eastern Europeans, who were displaced or had been made homeless, came to settle in the UK. And then in the period after the opening of EU accession in 2004, many more Eastern Europeans have migrated to the UK. (Information from Wikipedia. *Eastern Europeans in the UK*)

There are now about 2.2 million Eastern European nationals living in the UK, with the largest groups being Polish (826,429), Romanian (554,452), Lithuanian (188,612), and Bulgarian (159,353). (Information from The Migration Observatory)

Although Brexit has stopped the free movement of labour from the EU into the UK, the war in Ukraine, following the invasion of Russian forces in February 2022, has resulted in a further influx of migrants from Eastern Europe.

To help Ukrainians fleeing the war, the UK Government set up the two support schemes in March 2022 – the Ukraine Family Scheme (allowing Ukrainians to join family members already in the UK) and the Ukrainian Sponsorship Scheme (allowing Ukrainians and their families to come to the UK if they have a named sponsor under the Homes for Ukrainian Scheme).

As of 23rd January 2024, a total of 251,000 visas had been issued under these two support schemes, and 198,800 people had so far arrived in the UK. Additionally, a further 31,000 Ukrainians, who held permission to be in the UK before the war started, had been given visas to extend their stay. (Information from UK Home Office on Gov.UK)

Bedfordshire has generally been a welcoming place for migrants including those from Eastern Europe. For example, a number of Polish migrants settled in Bedford after WW2. This helped build a recognised Polish community in Bedford, which led to the development of a local Polish Club, a Polish Culture House (Dom Polski) and a Polish Church (St Cuthbert's on Mill Street).

A bigger influx of Polish migrants then began to arrive after the accession of Poland to the EU in 2004. The following extract from PBIC's website gives some good information on this including a personalised summary of the early development of PBIC to support the growing Polish community in Bedford. (Information from PBIC. <https://pbic.org.uk/about/>)

Supporting the Polish community in Bedford – the early days of PBIC

The primary reasons for Polish migration was economic and social stability, with unemployment at home and better work prospects abroad.

When migrants arrived in Bedford and needed support with setting up their life here (finding employment, applying for national insurance numbers, securing housing etc) they would head to the Polish Church. However, very soon, the church was overwhelmed by the number of enquiries it was receiving.

To deal with the demand, the priest decided to start sending individuals to a nearby family who had been in the UK for a while and who was prepared to offer their support.

Robert and Mags Brady started supporting individuals in the front room of their small terraced house. They helped with general advice, job applications, welfare, housing and translation. Many individuals needed help with language skills, so Mags began teaching ESOL lessons to small groups of migrants.

At times there were queues of people down the street waiting to get help. Rob and Mags never turned anyone away, sometimes working through until the early hours of the morning. As word spread about Rob and Mags' support, friends and family started to get involved, these included Julia Brady, Jarosław Kudłaty, Tomasz Żuchnicki and Agnieszka Kluza.

This is how PBIC started, a team of family and friends, providing advice, guidance and teaching to enable independence for those who had just moved to the UK.

For 3 years, PBIC was organised and run by 5 volunteers. In that time, we received precious support from Glenis Orkisz from Bedford Race and Equality Council (BREC) and Jane Saunders from The Learning Partnership.

Migration from Lithuania also started increasing after 2004, and other Eastern Europeans began arriving in Bedfordshire (especially from Romania and Bulgaria) after further expansion of EU membership in 2007

And, since 2022, as a result of the war with Russia, Ukrainians have become one of the main new group of arrivals in Bedfordshire.

PBIC does most of its work in Bedford Borough. The latest overall population estimates for Bedford Borough are from 2022. These show that the total population in the Borough was 187,466. (Information from ONS 2022 Mid-Year Population Estimates).

In terms of the **ethnic breakdown of the local population** the latest figures are from the 2021 Census. These show that the Borough has a very diverse ethnic mix. Although “White – British” is still the largest ethnic group (64%), the remaining population (38%) are from a wide range of other backgrounds. There is not a specific category for “Eastern Europeans” and these are recorded in the “White – Other White” group, which was the 2nd largest single ethnic group in the local area making up 10% of the population (ie about 18,750 people). Although this group includes white people from many other backgrounds (eg Western Europeans, Australians, Americans etc), it is clear from just walking through Bedford town centre that a large proportion of this wider group will be from Eastern Europe.

From the 2021 Census there is also some data on the **country of birth of residents**. These figures show that Poland is the 2nd biggest country of birth for Bedford residents with 3.1% of residents (ie about 5,800 people) being born in Poland. Romania is 4th on the list with 1.8% of residents (ie about 3,375 people) being born in Romania. So just in the Polish and Romanian communities in Bedford there are at least 9,000 people, although, of course, it should be noted that these country of birth figures under-estimate the total number of people in an ethnic community because they do not include any children born in the UK. (Information from ONS Census 2021 data. “How life has changed in Bedford”)

Also in terms of the current Ukrainian crisis, 419 refugees had been supported by local hosts under the Homes for Ukraine Scheme since 2022. (Information from Bedford Borough Council, February 2024)

Although it is very difficult to give an exact **number of Eastern Europeans living in Bedford Borough**, it is clear from the above figures, that it must be well over 10,000 people, and possibly more likely to be in the region of about 15,000 people. There will, of course, also be significant numbers of Eastern European migrants living in Central Bedfordshire and Luton, which also come under the remit for PBIC’s work.

2.5 PBIC users

The data on PBIC’s users generally mirrors the changes in numbers and proportions in the different migrant groups in the local population figures.

Although PBIC’s early services were strongly focussed on the Polish community, PBIC’s users now come from a wide range of different communities, mainly from Central and Eastern Europe. Although the biggest client group is still Polish, very impressively, over the last 18 months, PBIC has also supported migrants from 79 other, different countries.

In relation to the country of origin, PBIC’s client nationality report for the period September 2022 to the end of March 2024 showed that, for the 2,349 clients who stated their nationality, the breakdown was:

1,895	Central / Eastern European (81%)	➔	The 1,895 Central / Eastern European clients consisted of: 804 Polish (34% of grand total) 376 Bulgarian (16%) 308 Romanian (13%) 306 Ukrainian (13%) 101 Other East European (4%)
144	Other European (6%)		
184	Asian / Middle Eastern (8%)		
61	African (3%)		
34	Central / South American (1%)		
31	Other (1%)		

2.6 Governance of PBIC

PBIC Ltd is a registered company (No. 06632086) and is governed by its Articles of Association, which were first adopted in 2008 and then revised in 2020 and 2023.

PBIC is also a registered charity (No. 1152448).

PBIC is overseen by a Board of Trustees, who are also the Company’s directors and, since 2023, its legal members. There are currently 7 trustees on the Board:

- Nigel Rees (Chair)
- Gemma Chiarini
- Monika Frak
- Gordon James
- Moritz Lank
- Thomas Leydon
- Sandra Turner



PBIC Trustees – with Mags Brady (PBIC CEO)

There is a good mix of experience on the Board. Monika has been a trustee since 2010, Nigel (Chair) since 2019, and Gemma since 2020. The other trustees have joined more recently - Gordon and Sandra joined in 2022, and Moritz and Tom joined in 2023.

The trustees are elected at the PBIC AGM or are co-opted during the year.

As well as having overall responsibility for the planning, management and finances of PBIC, the Board is also responsible for PBIC’s legal requirements as a charity.

As the trustees are also directors of PBIC Ltd, they are therefore also responsible for PBIC’s legal requirements as a limited company.

PBIC’s Board meets every couple of months on a Saturday, usually at the CVS office just across the road from PBICs main office.

The Company Secretary is Mags Brady who is also PBIC’s Chief Executive Officer.

Day to day management of PBIC is undertaken by the PBIC CEO (Mags Brady), who manages the paid staff and volunteers, and has direct responsibility for PBIC's services, funding, and external partnership arrangements.

The Chair of the Trustee Board (Nigel Rees) has regular one-to-one sessions with the PBIC CEO to provide ongoing support, and direct liaison with the Board.

Team meetings are held weekly at PBIC to keep all staff involved in the key work issues affecting PBIC.

2.7 Finances

Since its small beginnings in 2007 with very limited funds, PBIC has now grown into a much larger organisation with over a £½ million annual turnover.

PBIC now has a complex mix of income, and joint funding is used to finance much of its work. For example, 50% of the Community Fund funding was specifically used to support PBIC's Pathways for Recovery (P4R) project for 2 years.

Interestingly, and positively, over 50% of PBIC's funding is now for commissioned work. And this commissioning often results from approaches to PBIC by funders or partner agencies. Recent examples of this commissioned work have been:

- **Ukrainian Support Project** – funded by Bedford Borough Council
- **Homeless Support Project** – funded by Bedford Borough Council through SMART
- **Pathways for Recovery (P4R)** – as a sub-contractor of the University of Northampton on this employment project

PBIC are currently in discussion with Cranfield University and Cambridge University about possible future research projects.

Ideally, PBIC would like some regular core funding for its general, holistic services. But funding is now nearly always for specific activities or projects.

PBIC has a good level of reserves (over £350,000) at the end of their last financial year on 30/6/23. However, to ensure future sustainability, PBIC is looking at using a professional fundraiser in the future.

2022/23 finances

PBIC's Annual Accounts for 2022/23 showed that **income** for the financial year (in the period 1/7/22 – 30/6/23) was £674,958, consisting of grants (£668,715), donations (£5,389) and other income (£854):

Grants	
University of Northampton	£138,563
Bedford Borough Council	£137,119
Big Lottery Community Fund	£125,756
Futures Advice	£124,327
Luton Borough Council	£ 44,499
Home Office	£ 33,126
The Harpur Trust	£ 21,312
Bedfordshire and Luton Community Foundation	£ 3,722
Bedford College	£ 500
Other grants for projects	£ 39,791
Donations	£ 5,389
Other income	£ 854
TOTAL	£674,958

Expenditure in the financial year was £595,773 consisting of

Direct support costs (including wages and volunteer costs)	£476,067
Indirect employee costs (including training and travel)	£ 7,514
Premise costs (including rent, rates and insurance)	£ 23,652
General administrative costs	£ 58,244
Professional and consultancy fees	£ 18,023
Other support costs	£ 9,206
Governance costs	£ 3,067
TOTAL	£595,773

This resulted in PBIC making a healthy **surplus** of **£79,185** in 2022/23.

PBIC's **reserve assets** (on 30/6/23) stood at **£368,471**

2023/24 finances

PBIC's budget forecast for 2023/24 is £544,124. This is made up of:

Direct support costs (including wages and volunteer costs)	£474,699
Other costs	£ 69,425
Total	£544,124

2.8 PBIC services



PBIC provides a wide variety of services. Details of some of these are given in PBIC's general publicity leaflet. The services are currently generally listed at PBIC under the following headings:

- General advice
- Careers advice and support
- Welfare benefits advice
- ESOL classes
- Homelessness support
- Listening Service
- Immigration advice
- Connecting communities and sharing culture
- Volunteering opportunities
- Arts projects
- Ukrainian Support Service
- Foodbank vouchers

Further details of the services are given below with the descriptions taken from PBIC’s handout “**Our Free Services Comprise**”.

Our Free Services Comprise			
 <p>General Advice</p> <p>—</p> <p>This includes advice on healthcare, Council services, education, schools and mental health services and how to access them.</p>	 <p>Careers Advice and Support</p> <p>—</p> <p>Support with planning and developing careers - includes, but not limited to CV writing, job searching and action planning</p>	 <p>Welfare Benefits Advice</p> <p>—</p> <p>Including advice, information and support with the application processes for benefits such as Universal Credit and Child Benefit.</p>	 <p>ESOL Classes</p> <p>—</p> <p>Language is often the single biggest barrier to moving forward. We provide accredited ESOL classes for all levels.</p>
 <p>Homelessness support</p> <p>—</p> <p>Consisting of outreach work with migrant rough sleepers and those migrants on the verge of homelessness.</p>	 <p>Listening Service</p> <p>—</p> <p>Offered in Polish, Ukrainian or in English for migrants who need someone to talk to, offered both as a separate service and within advice sessions, reflecting our holistic approach.</p>	 <p>Immigration Advice</p> <p>—</p> <p>Support for European Union citizens with Pre-settled and Settled status issues who have missed the original deadline for applications.</p>	 <p>Volunteering Opportunities</p> <p>—</p> <p>We provide support with finding volunteer opportunities both within our charity and to external companies</p>

General advice

This includes advice on healthcare, Council services, education, schools and mental health services and how to access them.

Careers advice and support

Support with planning and developing careers – includes, but not limited to, CV writing, job searching and action planning

Welfare benefits advice

Including advice, information and support with the application processes for benefits such as Universal Credit and Child Benefit.

ESOL classes

Language is often the single biggest barrier to moving forward for migrants. An introductory “Step into English” course is used for complete beginners in English, and PBIC then offers accredited ESOL classes for other levels.

Homelessness support

Consisting of outreach work with migrant rough sleepers and those migrants on the verge of homelessness.

Listening service

Offered in Polish, Ukrainian or in English for migrants who need someone to talk to, offered both as a separate service and within advice sessions, reflecting our holistic approach.

Immigration advice

Support for European Union citizens with pre-settled and settled status issues who have missed the original deadline for applications.

Connecting communities and sharing culture

To help facilitate meaningful connections, PBIC organises support groups and curated cultural events. PBIC also works closely with the Polish and Ukrainian Saturday Schools, and supports its own children's and young people's musical group – **Promethidion**.

Volunteering opportunities

PBIC provides support with finding volunteer opportunities both within the charity and in external companies.

Arts projects

PBIC has successfully delivered several art-based projects, mainly exploring the theme of culture. This includes the MYID project and Art Masterclass for Ukrainian guests.

Ukrainian Support Project

In partnership with Bedford Borough Council, PBIC provides a specialist service for Ukrainians who have left Ukraine due to the conflict with Russia. The service can help Ukrainians settle into life with their host in Bedford and offers other support such as: mediation between hosts and guests; a Listening Service for people who need the chance to talk; and a Life in the UK course helping Ukrainians understand the difference between life in Ukraine and in the UK.

Foodbank vouchers

In partnership with Bedford Foodbank, PBIC is able to issue foodbank vouchers to clients who are in crisis and need emergency food support. Clients can then take the vouchers to obtain a food parcel from one of the 7 foodbank centres in Bedford and Kempston.

2.9 Staffing and volunteers

At the start of this evaluation in September 2023 there were 20 **paid staff** in post.

Name	Position(s)
Mags Brady	CEO
Rob Burton	Project Manager
Monika Rylance	Senior Adviser
Michal Burdyl	Immigration Adviser and Coordinator
Tetiana Vodopian	Listening Service Specialist / Reception Mentor
Beata Kacprzak	Adviser
Yulia Vasylieva	Adviser
Yana Volovich	Adviser / Outreach Worker
Kaja Juda Kawulicz	Adviser / Homelessness Support
Adam Brady	Immigration Adviser
Zofia Brady	Listening Service Specialist
Dominika Pawlik	ESOL Tutor
Adam Jolly	ESOL Tutor
Krzysztof Burzack	Outreach Worker
Jadwiga Paczocha	Office Support
Katarzyna Pizuch	Administrator / Finance Officer
Tetiana Trotsenko	Support Worker / Receptionist
Marcella Lukacova	Administrator
Alina Wesner-Cyrankowska	Admin Apprentice
Rob Brady	Admin Apprentice

NB Rob Burton and Tetiana Vodopian left PBIC in December 2023

Most of the staff at PBIC work full-time, although some are part-time workers. And a number of staff work across different roles.

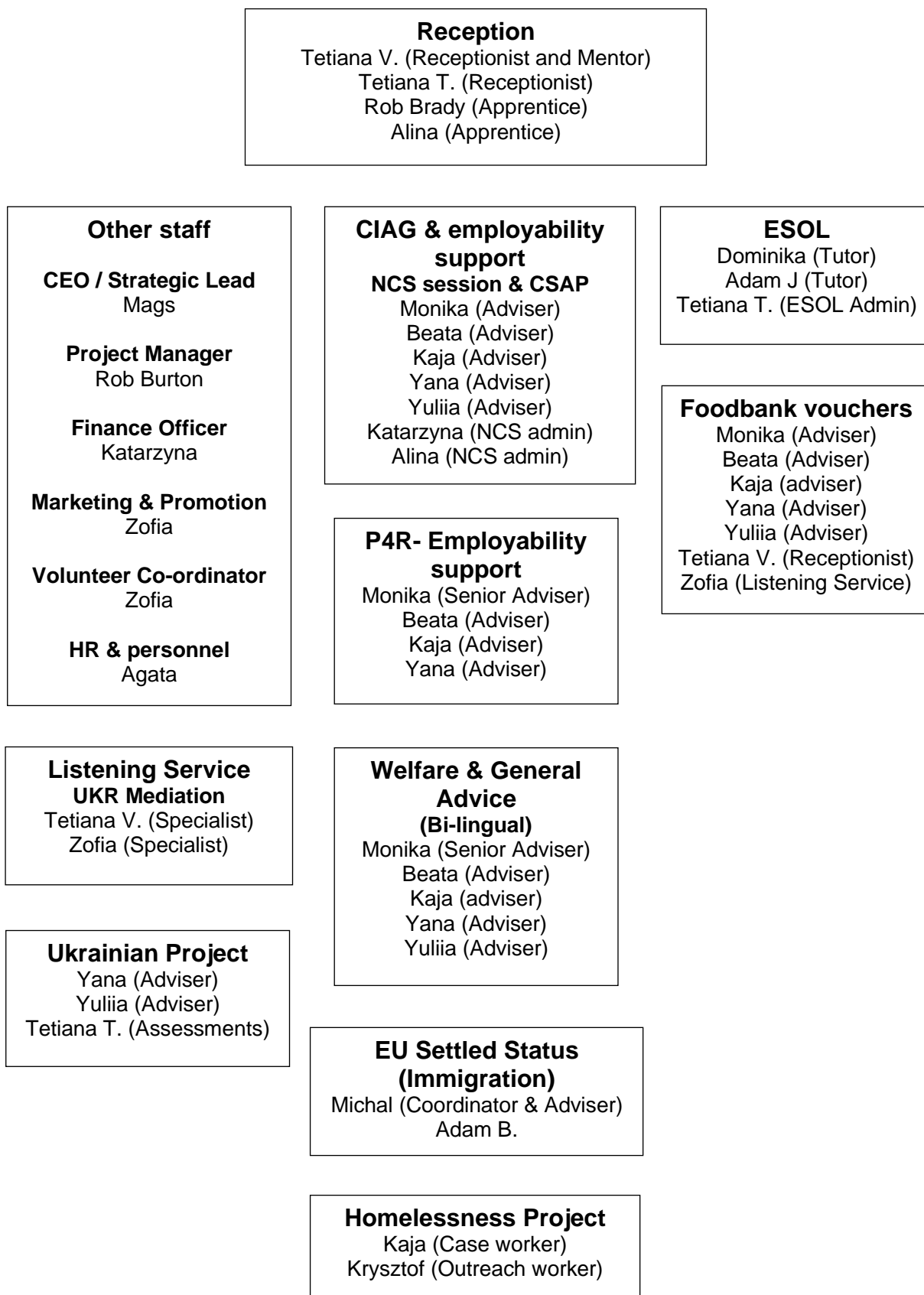
The majority of staff speak Polish, but here are also some Romanian and Ukrainian speakers.

PBIC Team meetings are held for staff on a weekly basis on Mondays and these are chaired by the PBIC CEO (Mags Brady).

There are also over 20 **volunteers** that support PBIC in a variety of ways including as interpreters, translators, mentors and general support workers. A number of volunteers specifically help with the planning and running of large PBIC events eg the Ukrainian Independence Day celebrations held in Bedford in August 2023.

There is good career progression at PBIC because about 30% of PBIC's current paid staff were previously volunteers at PBIC (as well many also being past PBIC clients) – with Alina, Beata, Katarzyna, Michal, Robert Brady, and Tetiana T. previously working as volunteers at PBIC.

2.10 PBIC service and staffing structure (2023/24)



3. YOU ARE VALUED - DETAILS OF PBIC'S WORK SUPPORTED BY THE COMMUNITY FUND

3.1 Overview

In January 2020 PBIC was awarded a **grant of £499,346 by the National Lottery Community Fund** (under its Reaching Communities funding stream) for a work project to support people from EU communities living in the UK. The funding was for 5 years from March 2020 to March 2025. This funded work was branded at PBIC as “**You are Valued**” (YAV).

Extra funding of £123,541 was awarded to PBIC as part of the grant in 2002.

3.2 Funding bid

The You are Valued project was based on PBIC's successful Migrant Integration Project which ended in March 2020.

The focus for the You are Valued project was to benefit EU adult migrants, both new and more settled, particularly those whose first language is not English. The original intention was to base the physical activities in Bedford and Luton and also to develop a webchat facility as an online tool for migrants all over the UK wanting to talk or access advice.

The project was planned to address two of the Community Fund's priorities:

- Bringing people together and building strong relationships in and across communities
- Creating and enabling more people to fulfil their potential by working to address issues at the earliest possible stage

The main activities in the project would be

- **Weekly drop-ins and coffee mornings** - for migrants to express their worries and concerns in their native language. (These sessions would be named in memory of Robert Brady, PBIC's co-founder, who sadly died in 2017)
- **Courses for migrants** - to learn English and to obtain employability skills such as job search, CV preparation, interviews, and basic IT.
- **Volunteer development** - migrants will be engaged in voluntary placements including interpreting, translating and mentoring for people from their communities.
- **Bi-lingual advice sessions** – to help migrants with their legal rights to reduce the risk of destitution and homelessness. A webchat facility will also be offered.

As well as directly benefiting EU migrants, the project would also benefit the local Councils, the Job Centre, the NHS, local employers, colleges and many 3rd sector organisations, by reducing the strain of these organisations and helping them engage and provide services for EU migrants.

In the funding bid, the numbers of beneficiaries to be helped by the project were split across four **outcomes**:

Outcome 1: The mental wellbeing of migrants will be improved

Outcome 2: Migrants will move towards fulfilling their employment potential as a result of culturally tailored careers advice and English language provision

Outcome 3: Migrants will feel better integrated into the British community as a result of volunteering

Outcome 4: Migrants will gain awareness of their rights and increase confidence in their ability to manage their own problems as a result of competent, multilingual advice

The four **outcomes** above were used to set targets which would measure the success of the project.

Project Outcomes		Change Indicator	Target figure
No.	Details		
1	The mental wellbeing of migrants will be improved	People reporting that they were listened to and their issues were taken seriously	1,000
		People reporting feeling happier as a result of their interactions with PBIC's staff and volunteers	1,500
		People reporting reduced anxiety on issues which caused distress	1,500
2	Migrants will move towards fulfilling their employment potential as a result of culturally tailored careers advice and English language provision	People improving their English language skills	600
		People reporting feeling closer to fulfilling their employment potential	400
		People moving from being unemployed or inactive into employment	200
		People moving from unskilled work to employment where they can utilise their skills	200

Project Outcomes		Change Indicator	Target figure
No.	Details		
3	Migrants will feel better integrated into the British community as a result of volunteering	People engaging in volunteering placements	90
		People reporting that their volunteering placements have developed skills and knowledge which allow them to better integrate within British society	90
		People participating in volunteer led events promoting volunteering	3,000
4	Migrants will gain awareness of their rights and increase confidence in their ability to manage their own problems as a result of competent, multilingual advice	People benefitting from multilingual advice	1,800
		People reporting better understanding of their rights	1,200
		People reporting more confidence in accessing mainstream services independently	1,200

NB The original targets above, which were set in the project proposal, had to be revised later because of the Covid pandemic which had a major impact on everybody's work in 2020 and 2021.

Section 4 of this report looks in more detail at the project outcomes, and the services provided, to evaluate the success of the project.

3.3 Project finances and staffing

Following the original funding bid to the National Lottery, **£499,346** was given towards the total 5-year costs of the You are Valued work, with PBIC committed to trying to top-up this award by obtaining some funding from other sources.

However, in 2022, an application for further funding was made to the National Lottery and an **extra grant of £123,542** was awarded bringing the total grant for the 5 years of work up to **£622,888**. The extra amount of grant was allocated to Years 4 and 5 of the work. The revised grant allocation is therefore:

Year 1 (2020/21)	£129,956
Year 2 (2021/22)	£129,390
Year 3 (2022/23)	£120,000
Year 4 (2023/24)	£141,771
Year 5 (2024/25)	£101,771
Total Grant (revised)	£622,888

During the 5-year period, PBIC has also managed to raise another 250,877 to spend on YAV work from other funders. This has helped bring the total budget available for YAV work up to **£873,765**.

The award has directly helped to fund a Project Manager, a Careers-IAG Coordinator, and a Project Administrator – all for 35 hours a week. Funds have also been used for sessional tutors and sessional advisers.

The award has also helped to partly support PBIC's general running expenses such as: rent, utilities costs and other office overheads; staff and volunteer recruitment; staff and volunteer training; staff and volunteer travel expenses; evaluation costs; audit costs; and governance costs.

3.4 Project services and activities

Although the National Lottery funding was ostensibly for a new project ("You are Valued"), in reality, the funding actually provided money to enable PBIC to continue with, and expand on, some of the activities and services that it was already providing. (See **Section 2.8** of this report for a summary of the activities and services provided by PBIC).

From its small beginnings in 2007, PBIC has provided opportunities for its clients to come and get basic information, advice and support about a range of social welfare issues. As PBIC developed, this advice work has become more formalised, involving advice on welfare benefits, other general issues (such as healthcare, Council services, education and schools), and immigration (first relating to EU Settlement Status only and then more recently on other, basic immigration issues).

Providing information, advice and guidance (IAG) on employment, training and careers has also been a long-standing part of PBIC's offer.

Both of these types of advice (ie Careers-IAG and social welfare advice) are partly supported by the YAV funding.

Some other PBIC activities are also funded by the YAV funding. These include:

- ESOL classes
- Listening service

The YAV funding also helps to contribute towards the costs of PBIC's backroom staff including:

- PBIC CEO
- Reception staff
- Office support staff

However, the following PBIC services and activities are **not** funded by the YAV grant.

- Homelessness Support
- Ukrainian Support Project
- Foodbank voucher service
- Arts projects
- Promethidion

4. YOU ARE VALUED - EVALUATION OF PBIC'S WORK SUPPORTED BY THE COMMUNITY FUND

4.1 Evaluation methodology

The **basic approach** used in the evaluation has been based on the guidance produced by the Joseph Rowntree Foundation – *Evaluating community projects: A practical guide*.

Step 1 – Review the situation

Step 2 – Gather evidence for the evaluation

Step 3 – Analyse the evidence

Step 4 – Make use of what you have found out

Step 5 – Share your findings with others

Infotrain has been responsible for Steps 1, 2 and 3 above, and then PBIC will be responsible for Steps 4 and 5.

The **timetable** used for the evaluation can be found on **Page 3** of this report.

The discussions with PBIC, and the general background reading, in July–September 2023, helped in the review of PBIC's situation (Step 1 above). Most of the evidence was then gathered for the evaluation from September to December 2023 (Step 2). This evidence was analysed, and conclusions and suggestions for consideration were drafted, in early 2024 (Step 3). A further update has been added in July 2024.

The evaluation report, with its suggestions for consideration (see **Section 5** of this report), will now be circulated to the PBIC Trustee Board for discussion and approval.

It is suggested that the agreed suggestions for consideration from the evaluation report are then taken forward by PBIC (Step 4 above), and are shared by PBIC with the National Lottery and with other relevant stakeholders, including PBIC staff and volunteers (Step 5).

The **key tools and methods** that I have used in the evaluation follow the good practice guidelines for evaluations outlined by the Evaluation Trust.

- Checking documents and records
- Counting (eg data and statistics)
- Observations
- Interviews / individual discussions
- Case studies
- Questionnaires / surveys
- Group discussions / review meetings
- Visual tools (eg photographs)

As sufficient evidence was gathered through a good variety of different methods, it was felt that there was no need to arrange any specific group discussions (especially as the evaluation had already included attendance, and some discussion, at a PBIC team meeting and a PBIC Trustees meeting).

Evaluation methods used	Checking documents and records	✓
	Counting data	✓
	Observations	✓
	Interviews / individual discussions	✓
	Case studies	✓
	Questionnaires / surveys	✓
	Group discussions	X
	Visual tools / photographs	✓

The findings from the evaluation are given below under the following headings:

- **Project outcomes** – see **Section 4.2**
- **Project finances** – see **Section 4.3**
- **PBIC services and activities** – see **Section 4.4**
- **Other issues relating to the YAV funded work** – see **Section 4.5**
- **Other general comments about PBIC** – see **Section 4.6**

In each section, in addition to the narrative and the statistical findings, I have also given a **summary opinion** on the findings.



Excellent results / practice / feedback



Good results / practice / feedback



Uncertain results / practice / feedback



Weak results / practice / feedback

Suggestions for consideration to enhance services in the future are also given in each section.

<p style="margin: 0;"><u>Suggestion for consideration</u></p> <p style="margin: 0;">It is suggested that</p>

4.2 Project outcomes

As part of the evaluation of the project outcomes I looked at the following documents:

- PBIC proposal to deliver the You are Valued project (December 2019)
- End of Year Report for YAV Year 1 (9/3/20 – 8/3/21) of the grant
- End of Year Report for YAV Year 3 (8/3/22 – 9/3/23) of the grant – which also included details from Year 2 (2021/22)
- Response to further questions around request for additional funding for YAV (February 2022)
- PBIC Annual Report for 2021/22 (30 June 2022)
- PBIC Annual Report for 2022/23 (30 June 2023)

The original outcomes for the project were drawn up and agreed in 2020. However, the Covid pandemic in 2020/21 obviously had a massive impact on the country as a whole and on most public service providers – including PBIC, where the office was closed during the different lockdowns, and all services had to be adapted, including introducing some remote services. These changes, especially having to use IT Communications, meant PBIC’s clients faced extra difficulties during the pandemic.

PBIC set up various systems to monitor the project outcomes and reported on them in its end of year reports to the National Lottery. Updates were then also given each year in the PBIC Annual Reports.

It should also be noted that in Year 3 a new data recording system was introduced, and a dedicated Project Manager (Rob Burton) was appointed. This definitely strengthened all of the project reporting from Year 3 onwards.

The progress to date (by the end of September 2023 in Year 4) on each outcome and indicator is given below. To help with reporting on the evaluation, we have given each indicator a number.

Project outcome 1: Improved mental wellbeing

Change indicators	Target figures		Cumulative progress
	Original	Revised	
1. People reporting they were listened to and their issues were taken seriously	1,000	700	End of Year 3 (March 2023): 846 Mid-Year 4 (September 2023): 1,209
2. People reporting feeling happier as a result of their interactions with PBIC’s staff and volunteers	1,500	1,050	End of Year 3 (March 2023): 836 Mid-Year 4 (September 2023): 1,221
3. People reporting reduced anxiety on issues which caused distress	1,500	1,050	End of Year 3 (March 2023): 745 Mid-Year 4 (September 2023): 1,114

After a slow start to the project in Year 1 and the early part of Year 2 due to the Covid pandemic, good progress was made in Year 3, and then very good progress was made in the first 6 months of Year 4 - for all three of the indicators for Project Outcome 1

For **Indicator 1**, the revised 5-year target (and even the original target) was already exceeded by September 2023. This is a really good achievement with 18 months of the project still left.

For **Indicator 2**, the revised 5-year target was already exceeded by September 2023. This is a really good achievement with 18 months of the project still left. There is a good chance that the original target will be reached before the end of the project.

For **Indicator 3**, the revised 5-year target was already exceeded by September 2023. This is a really good achievement with 18 months of the project still left. There is a good chance that the original target will be reached before the end of the project.



In summary for **Project Outcome 1**, there has been really good progress with all three indicators.

Project outcome 2: Fulfilling employment potential

Change indicators	Target figures		Cumulative progress
	Original	Revised	
4. People improving their English language skills	600	538	End of Year 3 (March 2023): 771 Mid-Year 4 (September 2023): 1,293
5. People reporting feeling closer to fulfilling their employment potential	400	320	End of Year 3 (March 20023): 506 Mid-Year 4 (September 2023): 798
6. People moving from being unemployed or inactive into employment	200	160	End of Year 3 (March 2023): 198 Mid-Year 4 (September 2023): 307
7. People moving from unskilled work to employment where they can utilise their skills	200	160	End of Year 3 (March 2023): 82 Mid-Year 4 (September 2023): 117

After the slow start to the project in Year 1 and the early part of Year 2 due to the Covid pandemic, good progress was made in Year 3, and then very good progress was made in the first 6 months of Year 4 - for three of the indicators for Project Outcome 2, especially for **Indicator 4**.

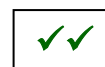
For **Indicator 4**, the revised 5-year target, and the original target, were both already exceeded by the end of Year 3. This is a great achievement considering that there were still 2 years of the project left. The introduction of the “Step into English” course for complete beginners in English definitely helped increase numbers for this indicator.

For **Indicator 5**, the revised 5-year target, and the original target, were also both already exceeded by the end of Year 3. This is a great achievement considering that there were 2 years of the project still left at that time.

For **Indicator 6**, the revised 5-year target was already exceeded by the end of Year 3, and the original target was then well exceeded by the end of September 2023. Again, this is a very good achievement with 18 months of the project still left.

For **Indicator 7**, the progress has been slower and at the end of September 2023 the number of people moving from unskilled work into work into more skilled work was below the revised 5-year target. However, with 18 months of the project still to go, there is a good chance that the revised target will be met.

In summary for **Project Outcome 2**, there has been very good progress with three of the indicators. There has been slower progress for **Indicator 7** but the target is on track to be successfully met by the end of the project.



Project outcome 3: Better integration through volunteering

Change indicators	Target figures		Progress to date
	Original	Revised	
8. People engaging in volunteering placements	90	90	End of Year 3 (March 2023): 35 Mid-Year 4 (September 2023): 71
9. People reporting that their volunteering placements have developed skills and knowledge which allow them to better integrate within British society	90	90	End of Year 3 (March 2023): 22 Mid-Year 4 (September 2023): 22
10. People participating in volunteer led events promoting volunteering	3,000	2,400	End of Year 3 (March 2023): 2,600 Mid-Year 4 (September 2023): 4,100

After the slow start to the project in Year 1 and the early part of Year 2 due to the Covid pandemic, some progress was made in Year 3, and then further progress was made in the first 6 months of Year 4 - for two of the indicators for Project Outcome 3, but not for **Indicator 9**.

For **Indicator 8**, the progress has been fairly slow. Despite picking up in Year 4, by the end of September 2023, the number was still below the revised 5-year target. However, with 18 months of the project still to go, there is a good chance that the revised (and original) target will be met.

For **Indicator 9**, however, there is a much bigger concern because the number of people reporting that they have developed skills and knowledge to help them better integrate into British Society is still very low after 3½ years of the project. It seems that that has been a delay in getting feedback from PBIC's volunteers so there is currently no recent data to support this indicator. However, it should be noted that as the project has developed there has been a move of focus away from using volunteers at PBIC to using more paid staff – mainly because of the growing complexity in the work needed (and the training required) to support clients effectively. Despite this change of focus, it is still important to get some Feedback from any volunteers being used at PBIC.

X

For **Indicator 10**, the revised 5-year target, and the original target was already exceeded by the end of September 2023. This is a very good achievement. The events organised by PBIC for Ukrainian Independence Day and for Polish Heritage Day definitely helped in achieving this target.

In summary for **Project Outcome 3**, although **Indicator 10** has progressed very well, and the target for **Indicator 8** could be met by the end of the project, there is a concern about **Indicator 9**. Therefore, it is not clear if **Project Outcome 3** will be met in full.

?

Suggestion for consideration 1

It is suggested that immediate focus should be given to getting some **feedback or data from PBIC volunteers** about their volunteer placements. This will provide evidence to support Indicator 9 and Project Outcome 3.

This feedback could be gathered in different ways - by a written survey, or online through Survey Monkey, or through just organising a focus group or meeting of the volunteers.

Project outcome 4: Awareness of rights and increased confidence

Change indicators	Target figures		Progress to date
	Original	Revised	
11. People benefitting from multilingual advice	1,800	1,800	End of Year 3 (March 2023): 3,738 Mid-Year 4 (September 2023): 5,242
12. People reporting better understanding of their rights	1,200	1,200	End of Year 3 (March 2023): 701 Mid-Year 4 (September 2023): 1,088
13. People reporting more confidence in accessing mainstream services independently	1,200	1,200	End of Year 3 (March 2023): 669 Mid-Year 4 (September 2023): 1,050

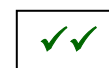
After the slow start to the project in Year 1 and the early part of Year 2 due to the Covid pandemic, some good progress was made in Year 3, and then further progress was made in the first 6 months of Year 4 – especially for **Indicator 11**.


For **Indicator 11**, the revised 5-year target, and the original target, were both already very well exceeded by the end of Year 3. This was a great achievement. This has been achieved by PBIC using extra advisers partly funded through its ESF funded project “P4R”.

For **Indicator 12**, the figure is below the 5-year target but good progress has been made and it is very likely that the target will be met by the end of the project.

For **Indicator 13**, the figure is below the 5-year target but good progress has been made and it is likely that the target will be met by the end of the project.

In summary for **Project Outcome 4**, there has been very good progress for **Indicator 11**, and the targets for **Indicators 12 and 13** should be met by the end of the project.



Overall, there can be no doubt that, in terms of the data presented by PBIC on the project outcomes, the You are Valued project has been a great success – especially considering the great difficulties at the beginning of the project during the Covid pandemic. In terms of the revised targets, 8 of the indicators have targets that have already been met (with 18 months still left for the project), and 4 indicators have targets that are likely to be met before the end of the project. 

There is a concern only about **Indicator 9** and it is suggested that immediate action is taken to try to rectify this. (See **Suggestion for consideration 1**).

The headline figures from the 13 change indicators already show that during the YAV Project:

Counting data

- Over 1,100 PBIC clients have already reported that they:
 - have been listened to and their issues were taken seriously
 - feel happier as a result of their interaction with PBIC
 - have reduced anxiety on issues which caused distress
- Over 1,200 people have improved their English language skills through attending PBIC courses
- Over 300 PBIC clients have moved from being unemployed or inactive into employment
- 4,000 people have participated in volunteer led events organised by PBIC
- Over 5,000 people have benefitted from multilingual advice at PBIC
- Over 1,000 people have reported that they have:
 - better understanding of their rights
 - increased confidence in accessing mainstream services independently



All the above figures are obviously very impressive. And it should also be noted what a good job PBIC did during the Covid pandemic. PBIC put a lot of effort into keeping its services going as best as possible, and, following thorough risk assessments, PBIC was one of the first local agencies to re-open its office after the lockdowns.

The Covid pandemic obviously meant that PBIC's planned services had to be changed and the outputs from the You are Valued work were naturally lower than originally envisaged. To help agencies that they were funding, the National Lottery encouraged agencies to reduce their 5-year targets where needed. PBIC's revised targets have clearly been easier to achieve but it should also be noted that PBIC has been able to already reach the original 5-year targets for some indicators eg Indicators 1, 4, 5, 6, 10 and 11.

However, on deeper analysis, there are a few questions about how some of the project data was collected and analysed.



For example, in the early part of the project, it took some time to develop effective data recording systems to measure the project indicators. This was obviously partly due to the extra pressures during the Covid pandemic. Anyway, the result was that there was sometimes a lack of data for a number of indicators in certain years (eg Indicators 1, 2 and 3 in Year 1, and Indicators 12 and 13 in Years 1 and 2), and only approximate data for some other indicators (eg Indicator 11 in Year 1). Also, throughout the project, I think there may have been a lack of clarity in the way that some data has been presented. In my opinion, this is partly due to the way the project indicators were written in the first place. All of the 13 indicators start with the word “People”. But it is not really clear whether this means the total number of people doing something, or whether it means the number of **unique** people doing it. For example, it was recorded for Indicator 11 that 1,650 people benefited from advice at PBIC in 2022/23. But I think this record shows that there were 1,650 advice appointments rather than 1,650 unique people receiving advice. It is important to clarify this because obviously some people came to PBIC for advice more than once in the year.

In its overall, general reporting on its services, PBIC differentiates between the total number of client appointments/cases (eg 6,822 in 2022/23) and the number of unique clients helped (eg 3,771 in the 2022/23). However, this distinction is not clearly made when looking at its specific services, and when reporting on the 13 project indicators.

I therefore think some of the project data is not as robust as it could be, especially for the Indicator 11 in Outcome 4 which relates to people accessing PBICs advice services – where there can be a significant difference between the number of advice appointments/cases and the number of unique clients being helped. Therefore, my suggestion is that PBIC should give a fuller and clearer explanation in the End of Year Reports about the methods that were used to collect and analyse the data. This could easily be remedied moving forward for the rest of the project. I also suggest it is important to present more data about Indicator 11.

Suggestion for consideration 2

It is suggested that, for clarity, a fuller **explanation of how the project data is collected and analysed** at PBIC should be added to the future National Lottery End of Year Reports.

It is also suggested that **extra data for Indicator 11 should be presented** to show both the total number of enquiries and the number of unique clients that have been helped.

Despite these minor concerns about some of the data collection and analysis, it is still clear to me that the You are Valued project has been a big success and that PBIC has used its Community Fund grant very effectively, resulting in significant positive outcomes for large numbers of clients.



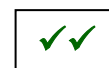
4.3 Project finances

Checking documents and records

As part of the evaluation of finances I looked at the following documents:

- PBIC proposal to deliver the You are Valued project (December 2019)
- End of Year Report for YAV Year 1 (9/3/20 – 8/3/21) of the grant
- End of Year Report for YAV Year 3 of the grant (8/3/22 – 9/3/23) of the grant – which also included details from Year 2 (2021/22)
- PBIC Annual Report for 2021/22 (30 June 2022)
- PBIC Annual Report for 2022/23 (30 June 2023)
- YAV Budget Plan for 2023/24

The **Annual Reports** produced by PBIC include very good and thorough details of PBIC's finances. Also detailed **budgets** are prepared at the beginning of each financial year.



It is clear that the project finances have been well planned and monitored throughout the project, and overall expenditure has been kept within budget.



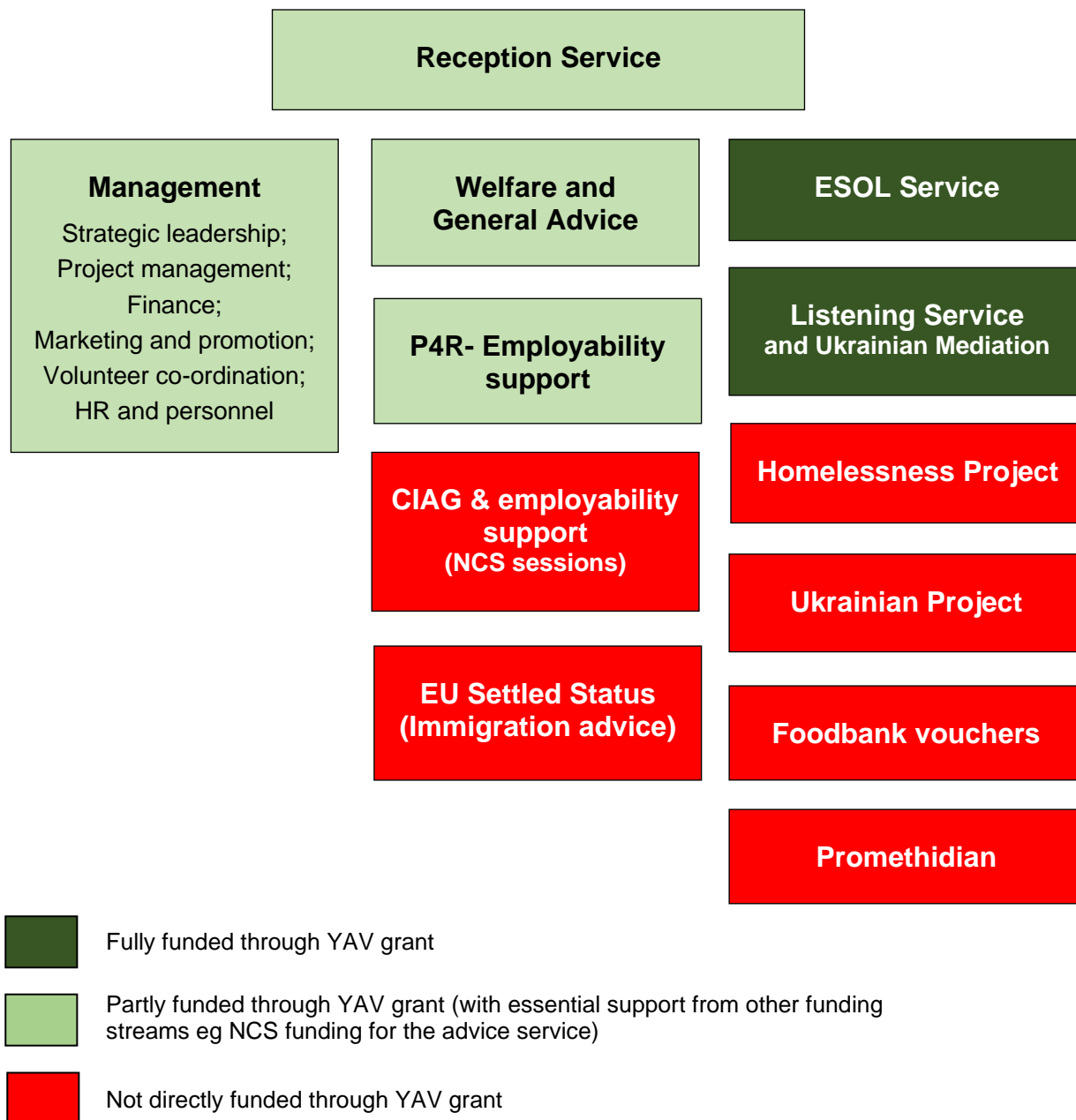
For example, the 2021/22 Annual Report confirmed that, although there was a deficit of £6,642 in the YAV transactions for the year (Income = £124,695 and expenditure of £131,337), the project was still in balance at the end of the year with £44,105 in reserve on 30th June 2022. In 2022/23 the YAV award for the year (£125,757) was fully spent and the project reserves remained at £44,105 on 30th June 2023.

The grant allocated for the YAV work in 2023/24 (Year 4) was £208,162, and for 2024/25 (Year 5) is £212,793. The YAV grant was supplemented by a further £66,391 in grants to PBIC from other funders in Year 4, and a further £111,022 from other funders in Year 5. So PBIC is in a good overall financial position.

4.4 PBIC services and activities

4.4.1 Overview

The diagram below shows the services and activities that are funded by the You are Valued funding.



I have focussed my evaluation work, and my comments in this report, on those services directly funded through the YAV funding – and especially on those services that have had a direct impact on the project outcomes for the YAV funding ie the Advice Services; the ESOL Service; and the Listening Service.

Although not funded directly by the You are Valued funding, it should be noted that as the YAV funding is major, 5-year, core funding for PBIC, just by having this grant (and helping PBIC grow, and build its reputation and funding base), the YAV funding has helped **all** of PBIC’s other services in an indirect way.

4.4.2 Advice Services

Overview and general comments

Counting data

PBIC's advice services are the headline element of PBIC's work, and "advice" is by far the most used service at PBIC, helping clients (in the period April 2022 - March 2023) with a very impressive 1,685 Employment and NCS cases and 1,215 Welfare Advice cases (plus cases separately recorded as EU Settled Status cases and Homelessness Project cases).



Checking documents and records

There are various types of advice given at PBIC. However, unfortunately, the descriptions of the different advice services provided are sometimes very confusing.



For example, in **PBIC's Office Manual** there are 4 advice services listed:

- Careers Information, Advice and Guidance
- General Information, Advice and Guidance
- EU Settlement Scheme Advice and Guidance
- Immigration Advice

Then in **PBIC's publicity leaflet "Information about PBIC services"** there are 3, slightly different, titles used:

- Careers advice and support to get a job
- General advice
- Welfare benefits advice

And, although "EU Settled Status support" is listed in the leaflet as a service it is not referred to as an advice service

Interestingly on **PBIC's website** only 2 advice services are listed:

- General advice
- Careers advice

On the website, "Benefits advice" is not listed as a separate service but is simply part of "General advice".

And again "EU Settled Status" is not listed as an advice service, although the description clearly states that support will be given by Advisors.

Then coming full circle, in **PBIC's diagram "Our Free Services Comprise"** (used in the proposal about PBIC's client support model) there are again apparently 4 advice services provided by PBIC – although with slightly different titles:

- General advice
- Careers advice and support
- Welfare benefits advice
- Immigration advice

These differing descriptions must be confusing to clients, and possibly to some staff too?

However, I suppose this is not too surprising because the terms “information”, “advice”, and “guidance”, although originally having specific technical meanings, are now used almost inter-changeably in different ways in different work sectors. And then the term “general” is so vague that it can mean many things and probably implies different things to different people.

One added complication is that different types of funding are available for different types of advice. This often means that when an organisation gets some new funding to give a specific type of advice, a tempting way forward is to set up a new team and promote this as a separate service – rather than considering whether the new work would naturally fit within an existing team. My view is that this may have happened with the EU Settled Status work at PBIC. Basically, advice on EU Settled Status is a specific type of immigration advice, and, of course, immigration advice is just a specific type of advice in its wider sense. (Presumably, if PBIC did not have specific funding to employ specialist advisers on EU Settled Status, it would end up just categorising any basic information given to clients on this issue, under its “General advice” service?).

My fairly obvious suggestion therefore is that these descriptions and titles about advice should all be simplified at PBIC.

There is some logic in putting everything where “advice” plays a part into the same team. So PBIC’s Advice Team could possibly include: specialist careers advisers, benefit advisers, and immigration advisers (and possibly even housing advisers, employment advisers or debt advisers, if specific funding ever became available for this work in the future), and also some generalist advisers advising on other issues.

However, I think there is a clear distinction between careers advice and all the other things mentioned above. “**Careers advice**” (or Information, Advice and Guidance as it is often referred to, or IAG for short) is about employability – job search, CV writing, training opportunities, preparing for job interviews, further education, career development etc. Whereas advice on benefits, debt, housing rights, employment rights, immigration, and other issues (eg child protection, education rights, healthcare rights etc), is all based on legal rights and is often called “**Social welfare advice**”

Therefore, my suggestion moving forward is to have two advice teams or sections at PBIC called:

1. Careers information, advice and guidance

This would cover:

- Job search
- CV writing
- Preparing for interviews
- Career development

2. Social welfare advice

This would cover:

- Welfare benefits advice
- Immigration advice (OISC Level 1) – including EU Settled Status
- Other general advice

This change would make things a lot simpler to describe and publicise – and make it easier for clients and staff to understand.

Interestingly, even though Careers-IAG work at PBIC attracts various, significant funding streams, it is, just one part of PBIC’s advice work. In its early days PBIC predominantly focussed on providing social welfare support for its clients, and this is still very important today.

Therefore, I feel that combining, and promoting, all the other advice that PBIC offers as Social Welfare Advice would strengthen what I believe is PBIC’s traditional, core business.

Suggestion for consideration 3

It is suggested that PBIC should review and simplify the **structure and descriptions of its advice services.**

My suggestion is to clearly promote two different types of advice as two different services at PBIC – Careers IAG and Social Welfare Advice.

Advisers at PBIC

During the evaluation work there were 5 advisers listed in the “advice team” at PBIC.

Monika Rylance	Senior Adviser
Beata Kacprzak	Adviser
Kaja Juda Kawulicz	Adviser
Yulia Vasylieva	Adviser
Yana Volovich	Adviser

NB Michael Burdyl and Adam Brady were also employed as advisers but, as they were giving specialist immigration advice on EU Settled Status, they were listed in a separate team at PBIC.

Although Monika Rylance is the Senior Adviser in the Advice Team, and she supports the other advisers in their work, Monika did not have a formal management role, and all the advisers (including the immigration advisers) were line managed by Rob Burton, PBIC’s Project Manager.

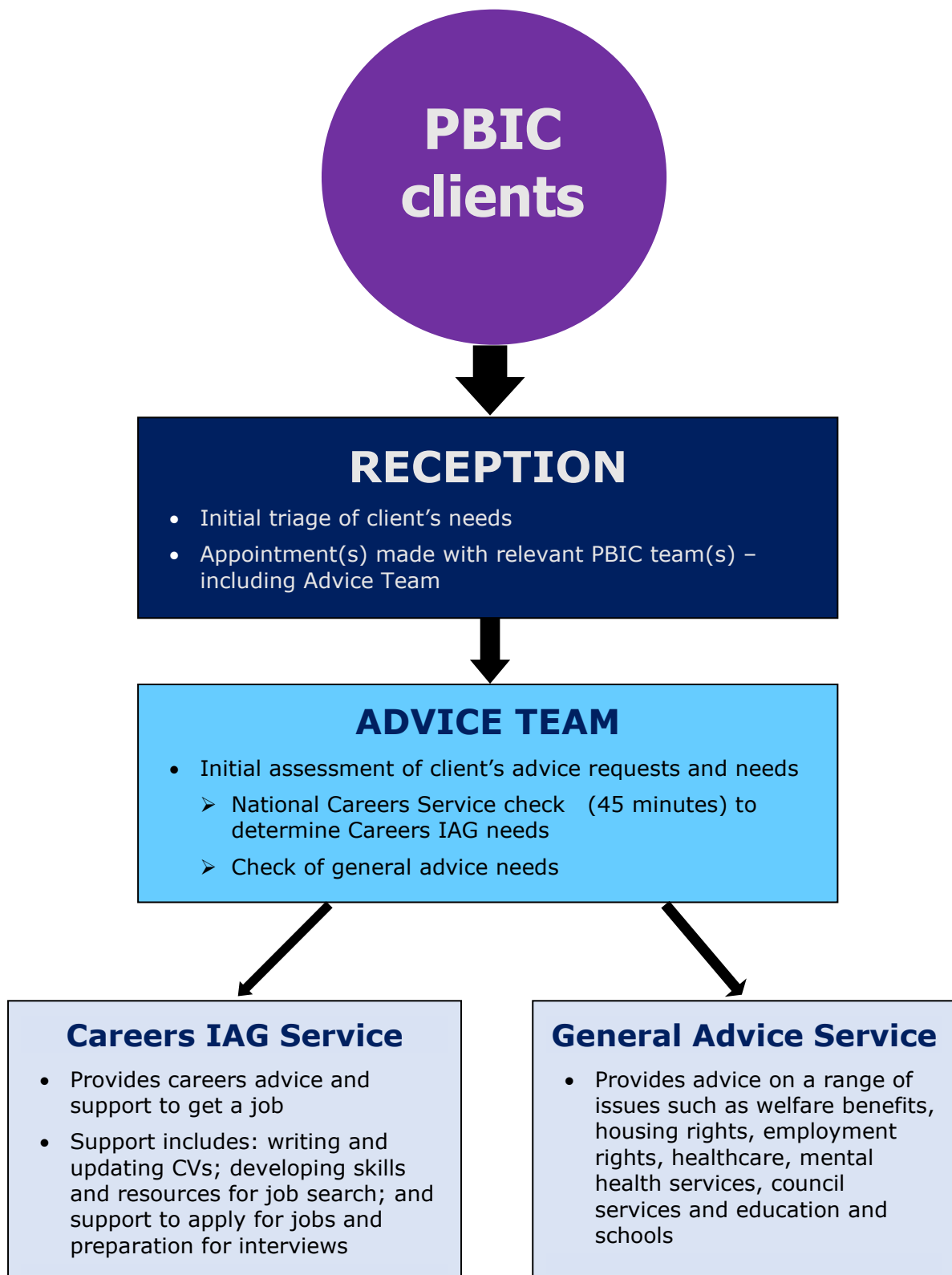
NB Rob left PBIC in December 2023 and Monika now has more of a leadership role in the team.

Advice process at PBIC

The diagram below shows the “journey” for a client who seeks advice at PBIC.

As part of the contract with the National Careers Service (NCS), most clients who request advice at PBIC go through an NCS IAG check when their general advice needs are being assessed. A client who needs help with careers, training and job-related issues will then be referred to an adviser for further advice and support. A client who needs help with social welfare issues (eg benefits, housing, employment rights, or other general issues) will be referred separately to an adviser for further advice and support on those issues. This initial assessment process is reliant on joint funding from the NCS and the YAV grant.

Getting advice at PBIC



NB If a client needs specialist immigration advice (eg on EU Settled Status), they can be referred by the Reception directly to PBIC's EU Settled Status Team.

Careers – IAG enquiries

In the period April 2022 – March 2023, there were 1,685 Employment and NCS cases and a further 300 cases in the P4R Project. So, I think this means there were a total of 1,985 Careers – IAG cases, although this is not actually stated as such in the data report.

In terms of the P4R Project itself there had been 297 participants (233 unemployed and 64 inactive participants) in the period January 2022 – September 2023. The project outcomes were that 43 unemployed people had gained employment, 164 people had enrolled on accredited learning, and 38 inactive participants had started job search activities.



Social welfare advice enquiries

In the year April 2022 – March 2023, there were 1,215 cases that could be considered as Social Welfare Advice cases. These were recorded in the PBIC data report for the year as:

Housing advice	164
Universal Credit	163
Other benefits	86
Advice about families/children	12
General advice	790
TOTAL	1,215



NB The total above does not include: Careers – IAG cases (1,685); EU Settled Status cases (514); Homelessness Project cases (118); and Other cases (872). Also Foodbank Vouchers (917) are recorded separately.

Although the figures above all seem very impressive, some of the figures are quite confusing especially the large number of General advice cases (790) and Other cases (872). What sort of cases are these? Also in my mind the number of cases involving Foodbank Vouchers (917) is not really clear. Presumably the figure is the number of vouchers given out? But are these separate, standalone requests for a foodbank voucher? Or should some of these foodbank cases simply be an outcome from a different sort of case that has already been counted?

During the evaluation, additional data became available, covering the 6-month period April – September 2023. The figures on Social Welfare cases were even more impressive because the 6-month total figure had already surpassed the annual figure for 2022/23.



Housing advice	123
Universal Credit	130
Advice about families/children	16
General advice	977
TOTAL	1,246

NB The total above does not include: EU Settled Status cases (850); and Employment/Careers-IAG cases; and Homelessness Project cases. Also Foodbank Vouchers (694) are recorded separately.

However, in my mind there is still some confusion about how the social welfare cases are categorised, and the breakdown does not go into enough detail. At the very least there should be a breakdown covering the main social welfare advice types – benefits, debt, housing, employment, consumer, family issues, immigration.

Suggestion for consideration 4

It is suggested that PBIC should review the **classification of the different types of social welfare advice** that it provides.

The current data is a little confusing and not detailed enough to give a better picture of the wide range of advice being given.

Advice recording system

PBIC uses Salesforce database software to record client details, a record of the client's journey at PBIC, and various information about their case. This software was introduced at PBIC in 2022 (replacing AdvicePro) and this has vastly improved the capacity for PBIC's case recording and reporting.



Observations

During this evaluation there was never the intention of doing a detailed quality audit of the PBIC advice records. However, when I met with Rob Burton (Project Manager), I was given a short overview of the Salesforce system by Rob.

The Dashboard in the system has a **calendar** for keeping dates of meetings, interviews and deadlines.

In the system, a list of each adviser's **open cases** can be seen.

In each **client case** the personal details of the client are recorded including:

- Full name
- Subject
- Case number
- Date opened
- Date last modified
- Date closed

And in a client's case, an adviser can record details of each interaction they have with the client.

Rob quickly showed me a few examples of case records, and just having a cursory glance at a few records showed the differences in style and detail, and quality, between advisers' records.

So, although the introduction of the Salesforce case management system has provided a good, set structure for the recording of advice records, my feeling is that the style and quality of case recording varies amongst the different advisers.

The good practice in advice work is that an advice record (at least for the first interview) should include a summary of:

- The client's situation
- The advice given to the client
- Any action taken with or for the client

It is not clear whether all advisers are following this good practice. My suggestion is that PBIC should develop a Case Management Policy which explains the standards expected in PBIC's advice records. (See **Page 61** for my **suggestion for consideration** on this issue).



Observations

Observation of advice interviews

Although the remit of this evaluation did not include an in-depth assessment of individual advisers nor a quality control audit of individual advice cases, I wanted to observe a couple of advice interviews just to get a feel for the type of work involved in PBIC's advice service. (**NB** As PBIC's Careers-IG work is already assessed as part of PBIC's Matrix quality standard, I decided to focus more on PBIC's social welfare advice provision in my evaluation work).

On 30th November I observed Monika Rylance (Senior Adviser) during two client interviews at PBIC – first with Mr N. and then with Mrs. B.

Observation of advice interview with Mr. N. (30/11/24)

Monika informed me before the interview that she was seeing a returning client, who she knew well. He was a single, Polish man (aged 66) who is receiving State Pension in the UK. He has a query about his claim for Pension Credit, which is a means-tested benefit for pensioners. Monika also informed me that she would be conducting the interview in Polish. She said that she would be leaving the door to the interview room ajar a little for ventilation and potential safety reasons.

Straight from the outset, Monika made very good eye contact with her client and used good body language. The questioning flowed well and it was obvious that Monika already had a good working relationship with her client.

Monika checked the case records for the client on PBIC's case recording system, and asked the client for any paperwork he had about the claim - and he gave her a pile of papers he had with him. It seemed he had applied for Pension Credit on 29th June. She then said she was going to call the Pension Credit Unit to get some information about the case. Before making the call, Monika closed the door for extra confidentiality.

Monika found out from the DWP officer on the phone that they were looking at a claim made on 19th September. Monika queried this date but (whether the claim had been made in June or September), it was still a long time for the client to be waiting. He only gets a small pension (£450 a month), has health issues and debts, and was now using a local foodbank for emergency food parcels. She explained the client had been on Universal Credit but should have moved to Pension Credit when he became 66 in June. The DWP officer said they would look into what had happened with the claim and will ring back later.

On checking the client's case notes again Monika confirmed that Mr N. had made various visits to PBIC earlier in the year and that he had been helped to claim Pension Credit and Housing Benefit on 29th June.

Monika finished the interview using good skills, and re-assured Mr N. that the DWP would phone him back – with a Polish interpreter.

I was very impressed with the professional way that Monika worked with Mr. N. who I could see (through just his interactions with me) could be a difficult client to work with. She had a very friendly and supportive approach, using various good interviewing skills, but it was also clear that she was firmly in control of the client and the interview – and that Mr N. respected her for that.



The only issue I would raise is that when Monika rang the DWP there seemed a bit of awkwardness in her saying that she was from PBIC in Bedford. As the name of the organisation does not immediately portray what PBIC actually does, I could sense a slight hesitation from the DWP Officer about who she was speaking to.

Observation of advice interview with Mrs. B. (30/11/24)

This interview was with a Polish woman making a new enquiry. Monika conducted the interview in Polish.

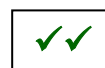
Right from the beginning, Monika made very good eye contact with her client and used good body language – and this continued throughout the interview. She then used good questioning and listening skills to explore the presenting issue with her client. Mrs. B. explained that she had anxiety and depression, and Monika acknowledged this and showed good empathy.

Mrs. B. is a housing association tenant with Peabody (previously Catalyst Housing), and lives in sheltered accommodation where she gets some support. She had an issue with the pump for her shower, which was very noisy and she was quite scared to use it. This problem had been going on some time but had not been resolved.

Monika tried to ring the client's Housing Officer at Peabody, and an alternative number, but both went to answerphone. She then looked at Peabody's website to check on how to make a complaint. Monika then conferred with her client about the wording before submitting the complaint.

The client then also raised another issue about PIP. An appeal had been made by PBIC about her entitlement, and Mrs B. had received a letter from the DWP. Monika checked the client's case notes, and read the DWP letter, which confirmed that the DWP acknowledged the appeal but stated that there had been no change in their decision. Monika explained that there was no action to take at the moment and that the client just needed to wait for her appeal hearing date. Monika stated that PBIC helps clients to make appeals but, unfortunately, does not have the capacity to attend appeal hearings.

Again, I was very impressed by Monika's professional approach, and she used very good interviewing skills throughout the interview. She showed good interest and empathy with the client's situation and I could see that the client was very appreciative of that. As in the previous interview (with Mr N.), Monika stayed very clam throughout and was obviously fully in control of the interview.



The only general comment I would make following the interview was, when considering future funding bids for the development of PBIC, whether it might be possible to look at providing some appeal representation services for clients? Obviously, having a representative at an appeal hearing would be good in itself (with national data showing that clients who are represented at appeal hearings have much greater chance of success) but especially so when English is not the first language for an appellant. This suggestion could possibly fit in with **Suggestion for consideration 3** in this report, if PBIC decided to re-structure and strengthen its social welfare advice services.

After the interviews that I observed, I also had the opportunity to have a short discussion with Monika. I gave her my positive feedback from the observations.

Monika told me she had worked at PBIC for 12 years. She said:

“Our clients trust us. We have built-up that trust”

“It’s sometimes a difficult job – especially when working with our non-Polish speaking clients from Bulgaria and Romania”

“Although the work sometimes has its low moments, the knowledge that we can help people with their lives builds me up personally.”

Feedback about the Advice Services

Client feedback

Questionnaires / surveys

PBIC tries to get every client, where appropriate, to complete an evaluation form. In fact, some clients complete two questionnaires as there is a one for the separately funded, initial National Careers Service check that PBIC’s advisers undertake with clients, and then a different questionnaire about PBIC’s services in general. In this evaluation I have focussed on the more general feedback about PBIC.

The overall results from the annual data report (for April 2022 to March 2023) on the general client feedback about PBIC were very impressive. For example, in terms of clients completing the questionnaire:

- 100% felt listened to by their adviser
- 94% felt that their issues/concerns were taken seriously
- 99% felt happier as a result of coming to PBIC
- 95% stated that PBIC’s support helped reduce anxiety on issues causing them distress
- 99% stated that they better understood their rights as a result of PBIC’s advice and support
- 95% felt more confident to access mainstream services as a result of the advice and support provided by PBIC



During the evaluation work, a survey was undertaken with PBIC staff (in November 2023) to get their comments about PBIC – including its strengths and problems, and ideas for the future. Survey forms were received back from 14 PBIC staff, and there were a number of comments from Advisers or made directly about the Advice Services.

Strengths

“Making clients feel welcome” x 2

“Good customer service”

“The positive impact on people’s lives”

“Seeing the difference our service makes”

“Changing people’s lives for the better”

“We help regardless of background and cultural affiliation”

“Our clients are culturally diverse and come from a wide range of backgrounds”

“In our work we meet people who need help and because our services are free, we reach the most vulnerable people who turn to us as their last chance for help”

“Holistic approach, and real interest in people’s needs”

“We ensure that no individual is turned away and try to listen to everyone that comes to the charity, regardless of whether or not we can support them directly”

“We are flexible around the support we provide and even if there is a language barrier, we’ll do everything to support than”

“I can provide information and assistance on a wide range of topics, answer questions, provide support and engage in conversation whether our customers need help with information-related tasks or general enquiries”

“We encourage individuals to be ambitious and support them to achieve their educational and career goals”

“As an adviser, it is good to be able to help our clients with their education and careers”

CIAG is a service which supports people to find a new job or improve their skills”

“CIAG is gives people hope and let them believe in themselves”

“We support vulnerable people and whole families with settling in the new culture and adapt and integrate into the life, work, school, healthcare, housing, legal (citizen advice) services etc. in the UK, so that they can achieve and succeed”

“Our case management system makes it easy for both reception and advisers to analyse and understand how a client engages in our services, how often they come to PBIC, what support they’ve received in the past etc.”

“Booking appointments”

Problems

“Often the main problem is a lack of language, a lack of communication between the advisers and the client”

“The biggest issue is language barrier as we do not have enough volunteers”

“We don’t have translators”

“We do not have volunteers to help with translation, or if we do, not enough to be there every time we meet a client”

“We have too much paperwork which means advisers do not have enough time for helping people with their real needs and we always feel pressure of targets”

“I would simplify and decrease the paperwork for advisers so that they can focus more on their clients requests and follow up them in time”

“Our clients often come from different social and cultural backgrounds”

“The problem is that clients do not understand life in the UK and struggle with not knowing the law or UK regulations”

“One of the most common customer service challenges is the advisor’s inability to solve problems at short notice”

“We do not have natural light in the offices and that is why we feel very tired at the end of the day”

“Our work depends on funding and grants from the government”

Ideas for the future

“First and foremost, it’s training that helps the whole team develop”

“We need more resources to run the organisation and grow to help those most in need”

“More interpreters needed”

“Find more volunteers able to translate and interpret”

“More advisers needed”

“CIAG – set smaller targets, so the staff don’t need to be so stressed about meeting the target”.

“Communication within the team is very important and having a good atmosphere”

“Support from management and rewards are very motivating and support team morale”

“Less paperwork”

“Change the office”

Case studies

PBIC regularly collects case studies from all its staff/services that work with the public. This gives PBIC a very good bank of case studies, which can be used in various service reports, funding bids and presentations. Collecting and discussing these case studies can also help boost staff morale.



Case studies

Case Study: Mr and Mrs S. (Adviser: Monika)

Mr and Mrs S. are Polish nationals, in their late fifties who arrived in the UK more than 5 years ago. They both hold full settled status.

A few months ago Mr S. had surgery and he is still on a sick leave. His wife is working through an agency but does not have regular working hours. They used to receive Universal Credit but, unfortunately, they did not have sufficient IT skills so were not able to manage their UC account online and the claim was closed.

Mr and Mrs S. fell into rent arrears due to not having enough money to cover their bills. They also did not pay their Council Tax which resulted in a request from Bedford Borough Council to pay the Council Tax for the whole year, not in instalments.

We managed to re-apply successfully for UC and get it back in payment. It increased the clients' income, allowing them to manage their spending better. We contacted their landlord and agreed an instalment plan to pay off the outstanding arrears. The clients committed to make regular payments of their current rent too.

Regarding Mr and Mrs S's outstanding Council Tax, we contacted the Council and asked for an instalment plan too. BBC sent an expenditure form to the clients to complete and eventually agreed a payment plan. I helped Mr and Mrs S. apply for Council Tax Support which significantly reduced their CT bill.

Now the couple are on top of their payments, are managing their budget better, and are hoping for their financial situation to improve when Mr S's health improves and he gets back to work .

Case Study: Ukrainian woman (Adviser: Yana)

A Ukrainian woman, who came to England because of the war with Russia, came to our office to find out about the possibilities of finding a job here. She needed to find a language course, get a translation of her diploma, and to confirm how her Ukrainian qualifications would be viewed.

We initially helped her find the right English course for her needs, When the client enrolled on the course, it gave her a feeling of greater self-confidence and she began to actively look for a job in her specialty field - chemistry.

For a more successful job search, we sent documents about her education (diploma and grades) for translation and confirmation of qualifications to ECCTIS. The client received this translation back in a few days.

Soon after this, the client then found a job in her field in Bedford.

Case Study: Mr. A. (Adviser: Beata)

Mr. A. is 45. He was referred to PBIC by his friend. He had been unemployed for some time and wanted some advice on how to get back into work, particularly into agriculture industries where he had previous experience.

At the session, I helped Mr. A. create an action plan that would enable him to identify his own skills and direct his next steps. He then created his CV and learnt how to make it more appealing to prospective employers by highlighting his key strengths and skills.

We also explored different employers and recruitment organisations that could help with his job search, and I helped Mr. A. understand the hidden jobs market and how to access it.

During the sessions, Mr. A. expressed his interest in starting a small business in agriculture but did not have enough resources to do this.

We helped him explore possible funding that might be available to him. We also verified his eligibility for funding and applied for a small business loan. He was able to open up his business not long after.

Quality Marks for PBIC advice services

To support its Careers-IAG work, PBIC has had a **Matrix Quality Mark** since 2011.



Matrix is the nationally recognised quality standard for organisations providing information, advice and guidance relating to careers, learning and work. Having the Matrix quality mark has enabled PBIC to obtain funding for various Careers-IAG initiatives and projects over the years.



No doubt for commercial reasons, the Matrix award is now not limited solely to organisations providing IAG relating to careers, learning and work. However, the fact that Matrix is directly supported by the Department of Education, the Matrix Steering Group members are all education-based, the Matrix quality award is a key part of the National Careers Strategy, and the case study on the promotional video for Matrix covers a work-based scenario, all lead to the conclusion that the main focus of Matrix is still careers, learning and work.



Therefore, agencies that focus on social welfare advice, which is based on legal rights (such as advice on benefits, debt, housing, employment, family issues etc.) tend to have a different quality mark, namely the **Advice Quality Standard (AQS)**.

The AQS is managed by **Advice Services Alliance** which is the umbrella body for independent advice services in the UK. ASA members are national networks of not-for-profit organisations providing advice and help on the law, access to services and related issues. The ASA members are: Advice UK; Age UK; Citizens Advice; Law Centres Network; Shelter; Youth Access and Independent Age.

Locally the ASA quality mark is held by Citizens Advice (in Bedford, Mid Bedfordshire, Leighton Linlade, Dunstable and Luton); MacMillan Welfare Rights Service (Central Bedfordshire Council), Age Concern Luton, Luton All Women's Centre, Luton Irish Centre and Luton Rights.

In my mind, as social welfare advice is such a core part of PBIC's work, and that PBIC is a member of AdviceUK, it seems strange that PBIC has not considered applying for the AQS.



Additionally, there is also a legal requirement for an agency to have OISC accreditation to be able to give immigration advice. The OISC award is managed by the Office of the Immigration Services Commissioner.



In 2019 PBIC received Home Office funding to support EU migrants in applying to the EU Settlement Scheme to be able to remain in the UK. This new status came into force after the UK left the EU in January 2020. To be able to give this advice PBIC obtained an OISC award to provide Level 1 advice to clients about the EU Settled Status scheme.



In September 2023 PBIC was then also given approval by the OISC to give Full Level 1 Immigration Advice. This is a great achievement and a major step forward for PBIC and its advice offer.



In an ideal world I believe that PBIC should have a Matrix quality mark for its Careers-IAG service, OISC accreditation for its immigration advice, and also the Advice Quality Standard for its social welfare advice. So, my suggestion is for PBIC to now consider applying for the AQS. However, I recognise that this may be a challenge for PBIC because of the extra cost involved in having another quality mark, and the extra staff time involved in applying for and maintaining the AQS. However, at the very least, I suggest that PBIC should try to plan and oversee its social welfare advice services so that PBIC is working to the AQS standards.

Suggestion for consideration 5

It is suggested that PBIC should consider applying for the **Advice Quality Standard** for its social welfare advice service.

If this is a challenge, due to limited resources, at least, PBIC should plan and oversee its social welfare advice services so that PBIC is working to the AQS standards.

Conclusions on the evaluation of the Advice Service

PBIC's Advice Service (covering Careers-IAG and social welfare advice) is a core part of PBIC's work and provides essential support to large numbers of PBIC clients. The feedback from clients is very positive, and I was very impressed by my observations of advice interviews.



The advisers at PBIC are very committed and generally the service operates at a high standard. However, I have given 4 suggestions for consideration that I think will help enhance the service moving forward in the longer-term:

- Clarify and simplify the structure of PBIC's advice services (**Suggestion 2**);
- Review the way PBIC classifies its social welfare advice cases (**Suggestion 3**);
- Develop a Case Management Policy to help standardise the advice recording (**Suggestion 4**);
- Consider applying for the Advice Quality Standard (**Suggestion 5**).

From the staff feedback, which was also mainly very positive, there were a couple of concerns that should be noted for future planning:

- More interpreters / translators are needed
- The targets and paperwork for some of the funding streams are very challenging for staff

4.4.4 ESOL Service

Overview

PBIC provides a range of English language support and training.

Clients cannot simply request a place on an ESOL (English for Speakers of Other Languages) course at PBIC – they need to go through a Careers-IG assessment first, and then a PBIC adviser can make a referral, if appropriate.

If referred for potential ESOL support, a client will first be placed on a **Step into English programme**, which is a 3-session introduction to ESOL. The Step into English programmes also include presentations from Bedfordshire Police, Bedfordshire Fire and Rescue, and Bedford Borough Council to help raise knowledge about services in the local community. This course is AQA accredited and allows the course tutor to assess a client's level of English.

After completion of the introductory course, clients can then attend an **ESOL programme** at their appropriate level (Pre-entry Level; Entry Levels 1, 2 or 3; and Level 1) at PBIC – or with another provider.

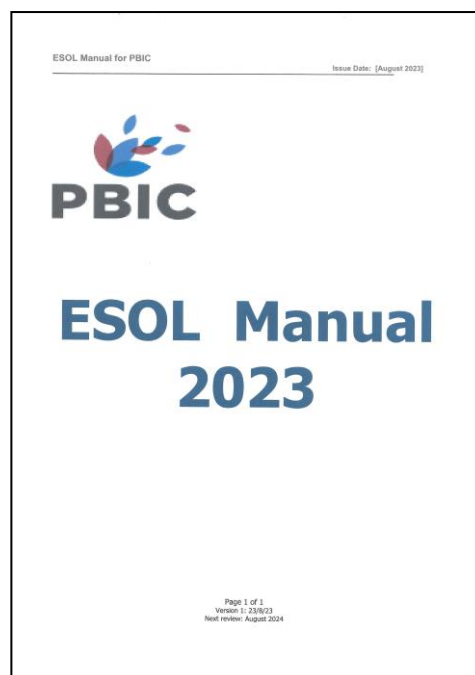
There are two English tutors working at PBIC - Dominika Pawlik and Adam Jolly. And Tetiana Trotsenko provides administrative support for the ESOL Service.

English classes for PBIC clients are held at different times of the day on Mondays to Saturdays and generally lessons are for 2-3 hours. The Step into English classes involve 9 hours of learning over 3 weeks. The ESOL classes consist of 36-45 hours of learning generally over 12-15 weeks. PBIC's ESOL classes are all accredited through AQA.

Additionally, PBIC also provide a specific English course for Ukrainians, a conversation class for Ukrainian teenagers, and a conversation class for Romanians

A useful **ESOL Manual** has been developed at PBIC to help the tutors and the administrator in their work, and this was updated in August 2023.


The manual includes good guidance on all aspects of PBIC's ESOL service and how it is administered, delivered and evaluated.




Data

Counting data

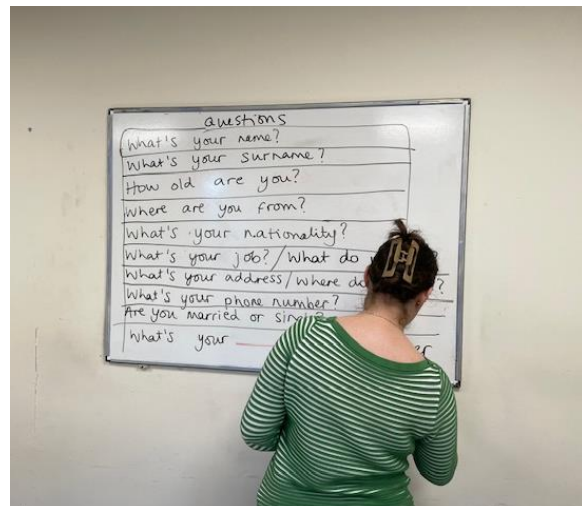
In the period April 2022 – March 2023, 611 individuals accessed PBIC's ESOL service, including the Step into English classes.

In the 6-month period April – September 2023, a further 603 learners participated in the English courses. In this period, 224 learners completed the Step into English programme and 379 learners completed a 45-hour ESOL class as a follow-on to the introductory programme. During this period there were 18 Step into English courses held, and 22 ESOL courses. This is all very impressive. 

If a learner completes 80% of the ESOL programme, they are awarded an AQA certificate and given the option to continue their learning at the next ESOL level – either at PBIC or with another provider. In the period April – September 2023, 130 learners achieved an AQA accreditation. 

Observation of an English class

As part of my evaluation, I observed a **Step into English** class at PBIC on 30th November. The tutor was Domenika Pawlik.



Observation of a Step into English class (30/11/24)

There were 15 learners in the class from a variety of countries. It was obvious from the beginning that it was a very mixed ability group – some were complete beginners in English, but a few already had a very good knowledge of English. The theme of this particular class was speaking and writing.

What came across immediately to me was Domenika's enthusiasm for teaching. She had a very lively and dynamic approach. She also had a very friendly demeanour using a lot of humour. All of this kept the learners engaged throughout the session.

The first activity in the session focussed on pronunciation and how some English words that look similar, in terms of their spelling, can sometimes sound different when spoken. Domenika used a writing board, some Powerpoint slides with images of words used, and an activity sheet ("Which one doesn't belong?") to help teach some examples of this. The learners worked in small groups to go through the activity (looking at 5 questions at a time) and then coming back for a general discussion to find the correct answer. In each question there were four 4 words using the same vowel(s), and the learners had to choose the one word where there was a different vowel sound to the other three words (eg "no", "go", "do" and "so"). This activity worked very well and everybody seemed involved.

The second part of the course was built around another activity which was aimed at improving conversational techniques and confidence. The group was spilt into pairs and each learner took turns in being a given, imaginary person, while the other learner thought of questions to ask to find out the other person's name, age, nationality, job and other person's information. This activity worked reasonably well but I could see that a few people were a little confused. Domenika went around the room and offered good support to those who needed some help. A couple of learners were visually impaired and were being supported by family carers. Domenika showed good empathy to these learners who had special needs.

Linked to the course were a couple of assessment exercises which needed to be completed and would then be assessed by Domenika. The results would then help determine which future ESOL class would best suit each learner.

After the course finished, Domenika stayed on to give some advice to a learner who was obviously ready to progress to a much more advanced, specialist English course (IELTS) than PBIC could provide.

I was very impressed by Domenika's general enthusiasm when teaching and her very friendly and supportive approach. Having 15 mixed ability learners in a class learning a foreign language is not easy, but Domenika coped very well with this and generally managed the session very effectively.



It was no surprise to me to hear later that Domenika’s parents had been PBIC service users, and that Domenika herself had been a member of PBIC’s Promethidion social group. Domenika obviously has a very strong connection with PBIC and its users.

However, one suggestion for future development is that Domenika could consider developing some of her own training materials. Both of the activity sheets used in the class had been copied from other sources. Sometimes (eg when preparation time is limited for a one-off course), this is a necessity. However, for a course that is going to be presented many times, it is worth tutors investing a bit of time to prepare material that they have designed themselves, and that can be geared specifically to their own students’ specific needs. Also having materials that can be branded as PBIC’s own materials would give extra prominence to PBIC’s ESOL service.

In my opinion, the above suggestion, could especially help in the second activity used on the course by Domenika. The activity sheet used gives a scenario of an imaginary Japanese student. This could easily be changed to an imaginary student from Eastern Europe to make it more relevant to PBIC’s learners. But an even stronger approach would be to also change the activity a little bit. In the activity I observed, the group was spilt into pairs. But these pairs simply seemed to be made up by people sitting together becoming a pair – and very often they already knew each other. However, if some of the group were asked to move chairs they could easily sit next to somebody else they did not know. Then the personal profile (name, age etc.) could simply be the real name, age etc. of a real student, which would make it easier. This would also have the added advantage of the learners in the class getting to know each other more – by asking questions such as “What’s your name?” “What country do you come from?” etc. And, of course, this would also help the tutor get to know (and remember) everybody’s name.

Suggestion for consideration 6

It is suggested that, to make the **ESOL training activities** more relevant to PBIC’s learners, and to give PBIC extra prominence as a learning provider, the PBIC tutors should consider developing their own training materials that can be branded as PBIC training resources.

Feedback on the ESOL Service

Learner feedback

Counting data

PBIC asks learners to complete a questionnaire about their learning at the end of each ESOL programme. The feedback received from 100 learners completing an ESOL programme in the 6-month period April – September 2023 was:

- 100% enjoyed their learning
- 100% were happy with the programme provided by PBIC
- 100% were happy with the materials and lessons
- 95% felt they had improved their English language skills
- 95% would recommend PBIC’s ESOL programme to family and friends
- 95% enjoyed their learning
- 90% wanted to continue learning English

This learner feedback is obviously extremely positive.



During the evaluation work, a survey was undertaken with PBIC staff (in November 2023) to get their comments about PBIC – including its strengths and problems, and ideas for the future. Survey forms were received back from 14 PBIC staff, and there were a number of comments from ESOL Service staff or made directly about the ESOL Service.

Strengths

“Clients are happy with the level of teaching and with the structure of the classes”

“Learners express that they are satisfied with the classes and want to continue learning – and they come back to PBIC to do the next level of ESOL classes”

“Individual approach to each student”

“We allow learners to bring a child to a lesson, when needed”

“We check to see if everything is OK with our students, who miss lessons”

“We send reminder messages to all our students to make sure that they know the lesson timetable”

“We offer ESOL classes to clients of all nationalities and we try to accommodate as many people as possible by having classes on most days including some evenings and on Saturdays”

“We run a special class for Romanian speaking clients on Monday”.

“The certificate ceremony for clients at the end of an ESOL programme is a lovely occasion for them, and PBIC, to celebrate the achievements”

“Good communication between all team members and mutual support of each other”

“The heavy ESOL caseload is managed well by the tutors”

“We have good support from Rob our Project Manager and Tetiana with the ESOL admin”

NB Some of the comments above have been de-personalised and shortened

Problems

“Only one ESOL Tutor works more than 30 hours a week, and there is only one classroom. This means that we are unable to accept everybody who wants to attend our classes – especially those who need a higher level course. These clients have to be referred to other learning providers”

“There is a worry about the ESOL Project once Rob leaves his role as Project Manager - as this will leave a gap in the management of the project. If the ESOL staff have to take on some of the project management, this may be too much to handle”

Ideas for the future

“Rob leaving will change the dynamic of the ESOL Project. If I was in a position to make decisions, I would be looking for a new Project Manager for all of PBIC’s projects (as well as ESOL) because a project cannot function well without a leader”

“As the interest for ESOL classes at PBIC continues to grow, PBIC may need to look at hiring an additional tutor and hire some spaces nearby for the additional classes”

Case study

PBIC regularly collects case studies from all its staff/services that work with the public. This gives PBIC a very good bank of case studies, which can be used in various service reports, funding bids and presentations. Collecting and discussing these case studies can also help boost staff morale.



Case studies

Case Study: Polish man (Tutor: Domenika)

An older learner is the carer of his wife and two young grandchildren. At the beginning of the course, he was very quiet he didn't even speak to the other students speaking the same first language as him.

As the course went on, each week, the other students would encourage him to join them in the tea and coffee breaks. As we approached the end of the course in March, this man was a member of the class that participated in discussions, and seemed more relaxed and happier.

He told me that these classes have allowed him to take a break from his family responsibilities and learn new English language skills.

Conclusions on the evaluation of the ESOL service

PBIC's ESOL Service is very well used with 40 English classes being arranged in the 6-month period April – September 2023, and with over 600 learners attending the classes. The feedback from learners is very positive, and I was impressed by my observation of a STEP into English course.



My only suggestion was to consider developing some PBIC branded training materials (**Suggestion 6**).

From the staff feedback, which was also positive, there were a couple of concerns that should be noted for future planning:

- Demand for English courses is out-stripping demand.
- PBIC's Project Manager leaving may leave a gap in management support.

4.4.5 Listening Service

Overview

This project provides space for individuals to express the struggles and experiences they are dealing with in their lives in their native language.

There are 2 part-time staff (Tetiana Vodopian and Zofia Brady), 1 part-time Ukrainian support worker (Tetiana Trotsenko), and 2 volunteers in the Listening Service team. Using active listening techniques, the staff provide an empathetic and understanding approach to clients, and help them to open up about their struggles.

A major part of the work is supporting individuals struggling with depression and anxiety to access the Bedfordshire Wellbeing Service, and ensuring their needs for interpreters and translators are highlighted in the referral.

Many clients using the Listening Service are also referred internally to get advice on Careers-IG and social welfare issues.

Additionally weekly group sessions have been organised for Ukrainians which included opportunities for clients to talk about the situation in Ukraine and its effects on their family and friends. There are also a number art therapy activities arranged for the group.

Data

Counting data

In the 6th month period April – September 2023, 71 individuals were supported by the Listening Service across 121 sessions.



Feedback about the Listening Service

Questionnaires / surveys

Feedback from staff

During the evaluation work, a survey was undertaken with PBIC staff (in November 2023) to get their comments about PBIC – including its strengths and problems, and ideas for the future. Survey forms were received back from 14 PBIC staff, and there were some comments from Listening Service staff or made directly about the Listening Service.

Strengths

“Our service helps people to clarify what their need is, and how we can help. The Listening Service helps people to feel relief, feel listened to, and upload their thoughts and feelings”

Problems

“A big problem for us is clients who don’t speak English. We have volunteers who speak Bulgarian and Romanian. They sometimes help us with translation, but unfortunately this remains a big problem. That is the reason why, unfortunately, we cannot help our clients as well as we would like”.

“The most common problem is the inability to communicate with those clients who do not speak any of the languages spoken by people employed at PBIC. Frequent clients are people who can’t even read in their language and sometimes even Google Translate can’t help”

“Lack of availability of Bulgarian speaking volunteers”

“Clients with mental health disorders are also a challenge. We lack a specialist who would work with such clients. They need special treatment and understanding”

Ideas for the future

“I think it would be good to develop some art-based sessions for our service users, especially those accessing the Listening Service. Art is universal and everyone could join in, regardless of what language they speak”

Case studies

PBIC regularly collects case studies from all its staff/services that work with the public. This gives PBIC a very good bank of case studies, which can be used in various service reports, funding bids and presentations. Collecting and discussing these case studies can also help boost staff morale.



Two Listening Service case studies from 2023 are given below.

Case studies

Case Study: Young woman (Support Worker: Tetiana T.)

This young lady joined our Support Group because she couldn't talk to people through the language barrier. She lacked communication and started going to our group. Here she can communicate in her native language and not be afraid that she will be misunderstood. After she started visiting us, she made some friends, with whom she can now go out after work for coffee or just take a walk.

Our Support Group helped her quickly adapt to life in a foreign country. She hears many stories about how people learn English and how hard it is for them. This gives her more self-confidence and adds motivation while learning English. She is not afraid to make a mistake while speaking in English because she knows that everyone makes mistakes, not just her.

She is grateful to PBIC for having a place where she can be heard and understood. She also shares her experience of living with hosts with other members of the group. Thanks to this, she has got to know British culture better.

Case Study: Woman (Support Worker: Tetiana T.)

In the weekly Support Group for Ukrainian guests one woman came to us who is very lonely in England. She is very homesick for Ukraine and her friends back home. She lacks communication skills with people and has very poor English. Before she started attending our group, she felt lonely and confused.

After she started attending our group she said: *“I feel much better than I did thanks to you and the group”*. She made friends and the group went to Cambridge one weekend where they had fun. She is afraid to travel somewhere by herself because of the language barrier. She is very grateful to our support team for being able to speak her native language.

Our Support Group activities help her deal with loneliness and stress. Very often she comes in a bad mood to our meetings, but after the conversations and exercises that we do, she leaves relaxed and happy.

She says that our meetings help her feel less alone in a foreign country. She said: *“I visit the PBIC Support Group every week. This is the best day of the week for me because I can be myself at these meetings, meet friends and feel less alone”*.

Conclusions from the evaluation of the Listening Service

The overall conclusion is very positive.

Both the client feedback and the feedback from the staff surveys confirm the benefits of the having Listening Service available for vulnerable migrants.



As the general evaluation about the Listening Service was very positive, and the interviews/discussions with clients are often about sensitive issues, I did not feel it necessary or appropriate do any direct observations of the interviews or discussions.

The only concern that came out of the evaluation was the need for more Bulgarian and Romanian interpreters.

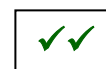
4.4.6 Other PBIC services

As explained on **Pages 21 and 31** of this report, PBIC offers a range of other services that are not part of the You are Valued Project, and are therefore not funded by the National Lottery grant. These include:

- Immigration advice
- Homelessness Support
- Ukrainian Support Project
- Foodbank voucher service
- Arts projects
- Promethidion

I have not specifically evaluated these other services, but, as PBIC offers a holistic service to its clients, it is sometimes difficult to differentiate between the different services especially in terms of general feedback about PBIC from clients, staff and trustees. I have therefore provided PBIC with a short summary of these other services with examples of the feedback received during my evaluation of PBIC.

The general conclusion on these other services was that PBIC provides a very impressive range of services for their East European clients – provided by very committed staff. The services are very much appreciated as can be seen by the very positive feedback obtained from clients and staff.



Although not funded directly by the You are Valued funding, it should be noted that as the YAV funding is major, 5-year, core funding for PBIC, in a sense just by supporting PBIC (and helping PBIC grow, and build its reputation and funding base), the YAV funding helps all of PBIC's services in an indirect way.

4.5 Other issues relating to PBIC's funded work

4.5.1. Project reporting

Checking documents and records

Project reports are submitted annually to the National Lottery. As part of the evaluation, I have looked at the following reports:

- End of Year Report for You are Valued Year 1 (9/3/20 – 8/3/21)
- End of Year Report for YAV Year 3 (8/3/22 – 9/3/23) – which also included details from Year 2 (2021/22)

The reports are generally completed very well. However, as mentioned on **Pages 29 and 30** and of this Report, I feel that, in the reporting on the project progress, there could have been a clearer explanation about how the outcomes data had been obtained.



The End of Year reports also ask PBIC to consider the lessons learned during the project. In a sense this is an opportunity for PBIC to self-evaluate itself.

In the **End of Year Report for Year 3** PBIC gave details of “What has worked particularly well” and “What has not worked as well as planned”.

End of Year Report for Year 3 Overall lessons learned

What has worked particularly well?

- PBIC’s experience in delivering holistic support to migrants resulted in us being chosen to deliver the initial, pilot Ukrainian Guest Support Coordination project.
- Our initial proposal to Bedford Borough on how to support the sudden influx of Ukrainians. This was initially accepted and emergency funding was provided for 6 months. We then had to go into competitive tender for a 2½ year contract, which we have won.
- Team being open and well prepared to take on challenges
- Adapting to our new database system
- Partnerships. In particular with partners from the Bedford Borough Partnership Forum, which was closed from the end of March. We were instrumental in voicing the need for continuation and as a result were given the go ahead from partners to lead on this forum beyond March.
- Successful match funding applications
- Development of our Board of Trustees

What has not worked as you had planned?

- Influx of Ukrainian Guests which was unexpected and demanded instant engagement
- Volunteer recruitment system which we have now amended
- Limited office space
- Delays with implementing new software system
- Issues with communications strategy

Feedback from the surveys that have been undertaken for his evaluation generally backs up the points that PBIC has identified in its own self-evaluation.

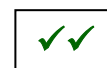
In terms of **what has worked particularly well** on the project, I therefore fully agree with the points that were given in the End of Year 3 report:

- The response to the unexpected influx of refugees from Ukraine (in the middle of the You are Valued project) was handled very well by PBIC. And winning the contract for the Ukrainian Guest Support project is testament to PBIC’s good reputation for effective service delivery in Bedford and its good relationship with Bedford Borough Council.
- PBIC staff are very committed to supporting clients and are open to new challenges.

- The new database system has greatly improved PBIC’s case recording and reporting capacity
- PBIC is particularly good at networking and partnership working especially on migrant issues and in the Careers-IAG secto.
- Fundraising for PBIC has been very successful in the last few years
- PBIC’s Board of Trustees is a great strength for the organisation.

Personally, I would also add to the above list:

- The very positive fact that 6 of the targets for project outcomes had already been met by the end of Year 3 (a full 2 years before the end of the project), which was a great achievement. These targets were:
 - People feeling that they were listened to
 - People improving their English language skills
 - People reporting feeling closer to fulfilling their employment potential
 - People moving from being unemployed or inactive into employment
 - People participating in volunteer led events promoting volunteering
 - People benefitting from multilingual advice



In terms of **what has not worked as well as planned** on the project, I also agree with the points that were given by PBIC especially:

- The stress of having to deal with the unexpected influx of Ukrainian guests
- Limited office space
- Delays with implementing the new software system

However, personally, I would also add to the above list:

- Very little data was available for one target (People reporting that their volunteering placements have developed skills and knowledge which allow them to better integrate within British society).

NB This issue has resulted in **Suggestion 1** (see **Page 27**) that I have made.

- Luton residents have not been supported by the project as originally planned

NB However, this issue was noted in a separate section of the End of Year 3 Report where it says: *“The only difference to the original proposal of client engagement is that we are not reaching the Luton population as much as planned. This was initially due the to the pandemic, but now we are so overwhelmed with work in Bedford Borough that our capacity for outreach in Luton is very limited. However, we do deliver to some Luton residents remotely or when they come to Bedford to access our service”.*

*It is clear that the low number of clients from Luton being helped by the YAV Project is still an issue. I have added this to the list of concerns given in **Section 5.2** of this report.*

4.5.2 PBIC Policies

A key element for an organisation (especially those offering a range of public services like PBIC) is its policies and how they are written, updated and implemented.

When I met Rob Burton (Project Manager) during the evaluation I asked for a list of PBIC's policies and he sent me the following list on 16th November:

- Equality, Diversity & Inclusion
- Health & Safety
- Safeguarding
- Complaints
- Employee Handbook
- Anti-fraud
- Business Continuity Plan
- Confidentiality
- Whistleblowing
- Anti-bullying
- Managing Allegations
- Disability & reasonable adjustments
- Modern Slavery
- CPD
- Staff recruitment
- Anti-radicalisation & Prevent
- Data Protection & GDPR
- Online Safety
- Sustainability
- PBIC Ethics

Rob confirmed that PBIC's policies are reviewed regularly, and the last review was in October 2022.

I know that the Trustee Board then met on 17th February 2024 for a special meeting to focus on reviewing PBIC's policies again.

It is clear to me that PBIC has a wide range of good organisational policies, and that the Trustee Board regularly checks and updates these policies. This is all very good practice.



Many agencies now put some of their key policies (especially the ones directly affecting clients) on their websites. But I could not see anything about PBIC's policies on its website. So, that should be something to consider moving forward.

Suggestion for consideration 7

It is suggested that PBIC should consider inserting a **link to PBIC's key policies** (especially those directly affecting clients) on the PBIC website.

Policies are obviously needed for a range of situations and activities. Although PBIC does have a good range of policies, these are actually the sort of general policies that would be needed for almost all community organisations that have a reasonable turnover, employ staff, and work with the public. For example, the list of PBIC's policies is very similar to the list of basic policies required by all community groups on the Bedfordshire CVS website (<https://www.cvsbeds.org.uk/resources>).

Traditionally, PBIC's core business has been about advising and supporting clients – on social welfare issues, right from the beginning of PBIC, and then, in more recent years, also on careers and employability issues (Careers-IAG). I think it is therefore important for PBIC to also ensure that it has adequate policies that specifically cover this core work – especially if PBIC wants to be giving high quality-controlled advice. But I am not sure that the current PBIC policies and guidance (eg Office Manual) do this adequately. ?

I would suggest that the key policies for quality advice work are:

- Adviser induction and training
- Confidentiality
- Conflict of interest
- Case management
- Signposting and referral
- Independent file review
- Complaints


Induction and training – Although PBIC has general induction procedures and monitors staff training through supervision (and its CPD Policy), I don't think the additional, specific induction and training required for professional advisers is recognised enough. ?

I believe the strength of the advice work and the advice team(s) at PBIC would be enhanced if there was a specific induction and training plan/checklist for somebody appointed as an adviser.


Confidentiality – PBIC already has a Confidentiality Policy and also has a Data Protection and GDPR Policy, which is good. ✓

Conflict of Interest – During the evaluation I was originally shown a policy covering the issue of conflict of interest in a general sense for PBIC as an organisation. This was good. However, this document did not cover the potential, specific conflict of interest issues that are part of advising clients. ?


My suggestion (already made to the PBIC Trustee Board prior to their policy review meeting on 17th February) is to expand its Conflict of Interest Policy to ensure that potential conflicts in advice work are specifically covered. This would help advisers and clients, and would also provide added protection for PBIC against complaints.


Case management – Although the introduction of the Salesforce case management system has provided a set structure for the recording of advice records, my feeling is that the style and quality of case recording varies amongst the different advisers. During this evaluation there was the never the intention of doing a detailed quality audit of the PBIC advice records. However, I was given a short overview of the Salesforce system by Rob Burton (Project Manager) in November, and just having a cursory glance at a few advice records showed the differences in style and detail, and quality, between advisers' records. 

Therefore, I suggest that there needs to be a specific policy, and some guidance, on how case records should be written at PBIC. Agreeing a Case Management Policy would be a good step forward. During the evaluation, I saw a good Office Manual that is used for the reception work. A good idea may be to also develop an **Advice Manual** for the advisers at PBIC? This would help advisers in their work, and it would also provide a tool for managers to help them in their supervision of advisers. All of this would then enhance the overall service to clients provided by PBIC.

Signposting and referral – A very important part of advice work is for organisations to ensure that their advisers pass a client onto another agency (if possible), when the organisation does not have the expertise or resources to support the client effectively. However, I could not see a PBIC policy about signposting and referral, which may possibly result in PBIC advisers feeling that passing a client onto another agency is a sign of weakness – when it is something that should be seen as positive (when done effectively). 

I therefore suggest that PBIC develops a Signposting and Referral Policy for its advice work.

Independent File Review – Obviously a good organisation will ensure that staff are supervised in their work. This can involve everyday observation of staff as a normal part of working in an office. But most agencies also use other methods for staff supervision and communication eg team meetings, individual supervision meetings, and annual appraisal meetings. During this evaluation I observed a PBIC team meeting (for all PBIC staff), and in my meeting with Rob Burton (Project Manager) he told me that he arranged meetings with specific teams (eg the advice team) to discuss workloads and share case studies. Rob also checked the Salesforce data system fortnightly, and arranged individual staff supervision meetings. All of this is very good for quality control and also for staff care. 

However, one gap is that there is not a formal check on the quality of individual advice case records. This is often called Independent File Review (IFR). IFR is used by solicitors and also advice agencies, especially those dealing with complex casework. IFR involves the regular checking of random cases for each adviser based on a set checklist of issues, and is part of the Advice Quality Standard (AQS). These checks can be done by the team manager but are sometimes done as peer review between advisers, or are undertaken by another experienced person (from inside or outside the organisation). 

If PBIC wants to enhance the quality of its advice work, and show that it is working to the AQS level of advice, it should consider introducing an Independent File Review Policy, and procedure, for its advice casework.

Complaints – PBIC already has a Complaints Policy, which is good.



Conclusions on the evaluation of PBIC's policies

My overall conclusion from the above is that, although PBIC has a good set of general policies, it should consider developing some new policies (and enhancing some existing ones) to support PBIC's advice services.

To accompany any new (or enhanced) policies, PBIC could also consider developing an **Advice Manual** that could provide a summary of the policies and appropriate guidance notes for advisers. Some training for advisers on some of the issues would also be a good idea.

Suggestion for consideration 8

It is suggested that PBIC should ensure that its **range of policies** not only covers PBIC's general work as a community organisation, but that the policies also support some of its specific work activities – especially its core advice services.

Policies for PBIC's advice services should include:

- Adviser induction and training
- Conflict of interest
- Case management
- Signposting and referral
- Independent file review
- Dealing with difficult clients

To support any new (or enhanced) policies, developing an Advice Manual and providing some staff training on particular issues should also be considered.

4.5.3 General feedback about PBIC as an organisation

During the evaluation work, surveys were undertaken with PBIC staff and trustees to get their comments about PBIC.

I also had a number of individual meetings with key personnel at PBIC including Nigel Rees (Chair of Trustee Board), Mags Brady (CEO) and Rob Burton (Project Manager). As well as providing me with very useful background information for the evaluation, Nigel, Mags and Rob also gave their own individual views about PBIC.

NB I also met the PBIC staff team at a weekly team meeting in November, and later had individual meetings with a number of PBIC staff during the evaluation. Feedback from staff given in the individual meetings has already been presented in a number of separate parts in **Section 4** of this report.

Feedback from senior personnel

Interviews / individual discussions

I had two introductory meetings with Nigel and Mags in summer 2023 and then had a briefing meeting with Rob Burton (Project Manager) in September. Then later, in November, I had an in-depth individual meeting with Mags, and 2 in-depth meetings with Rob. These were followed by an in-depth meeting with Nigel in early December.

Feedback from the senior personnel included:

“We provide various services and are trying to provide a holistic, best fit for our clients”

“We provide all-encompassing support”

“There is now a growing focus on active listening, holistic support for clients and the “client journey”

“Active listening is one of the central planks in our service provision”.

“We are really good at knowing what works for clients”

“We can help open up opportunities to clients in a calm, bespoke way. It is really satisfying seeing clients progressing into learning and jobs – and developing as people to do different things in the community”

“We need to focus on our model of delivery and try to tell funders about it. So far, we have been trying to squeeze into funders’ requirements and now it is the other way round. We hope that what we offer will be recognised”

“We are trying to improve communications between the PBIC trustees and the PBIC staff”

“PBIC has healthy financial reserves”

“50% of PBIC’s work is now directly commissioned, often with PBIC being approached by a funder or a partner agency”

“A big challenge for us is that funding comes from different sources and the funders have different data requirements and types of targets”

“Ideal funding for us would be core, generic funding for our holistic service – but funding is now nearly always for specific activities or projects”

“From a management perspective the main issue is funding at the moment with ESF disappearing.

“There is limited funding for an all-encompassing service to migrants (like what we provide). This impacts on resources and as a result put pressure on staff and management. Pursuing targets rather than supporting vulnerable people on a human level is then a challenge”

“Migrants are not seen as a specific priority by most funders”

Feedback from staff

Questionnaires / surveys

A survey with PBIC staff was distributed in November 2023 to get their comments about PBIC – including its strengths and problems, and ideas for the future. Survey forms were received back from 14 PBIC staff. A summary of the **general responses** about PBIC as an organisation are given below.

NB The feedback about specific PBIC services has already been presented earlier in this report in the sections covering the evaluation of PBIC's different services (see **Sections 4.4.2 – 4.4.5**).

PBIC's general strengths

"Holistic approach to clients (x 3)"

"Client-centric approach"

"All encompassing approach"

"Real interest in people's needs"

"The focus on customer journey and development"

"Individual approach, fast response, wide range of services, holistic approach, dedicated employees"

"An individual approach to each client and concern for their satisfaction"

"Adopting a humane approach and giving clients space, empathy and time to open up speak about the issues"

"We listen to our clients and so they feel comfortable and open up about the issues that they are facing. This means that sometimes a client who just came in for basic help (eg calling HMRC), opens up to our advisors and later on are given the opportunity to attend ESOL classes or have a meeting in the Listening Service. If the person comes to us with an issue that we don't deal with, we make sure to not just turn them away, we give them as much information and signpost them so that they can get the help they need"

"Making clients feel welcome"

"Customer orientation. We are always looking for ways to solve the client's problem. Clients feel listened to and calm after meeting with us. We try not only to solve the problem, but also to morally support the client"

"We are determined to help every person that comes through our doors as much as we can"

"We remember most of our clients and try to build close relationships with them. Clients trust our advisors, and they do everything to help as best they can"

"Work environment and culture"

"Atmosphere, relationships, people, professional job, engage"

"Family atmosphere, flexibility and understanding from the management"

"Positive relationship between staff and volunteers, open communication"

“The team, CEO and trustees!”

“Outstanding management”

“Good/amazing advisers”

“Professional, committed, and empathetic advisors – doing everything they can to solve their problems”

“Can do attitude”

Always ready to help”

“No one is turned away”

“Understanding of client’s issues and problems. Staff with big hearts and lots of knowledge and experience”

“We are one of the few organisations that help people from Eastern Europe and beyond”

“Other organisations such as CAB, Jobcentre or Bedford Borough Council send people to us that they cannot help and we are the last chance to help these people”.

“Multilingual staff - speaking Polish, Russian, Ukrainian and English and volunteers speaking Romanian”

“Range of services provided”

“Aiming for quality in specialist areas (immigration, career guidance, social welfare)”

“Helping with jobs and CVs”

“Good organisational structure”

“Creative staff meetings, drawing, meditation, meetings out of the office”.

“Strong partnerships with local charities”

“Good partner organisations”

PBIC’s general problems

“Surely the office could be moved to a bigger office? We need to improve the conditions for the staff to be able to help clients effectively”

“New office, more rooms needed”

“Working space”

“We need more space for staff and clients!”

“It would be nice to have a rest room for clients with children. Whole families (5 or more people) often come to us. If parents come with children, usually the children make noise. It distracts from work”

“Better venue - we could benefit from community centre type of venue with a coffee, small library etc.”

“Low brand recognition”

“Publicity and marketing”

“Employees are overwhelmed. We feel like we can burn out”

“Many responsibilities, and targets”

“There are a lot of blurred roles at work. I want to do specific work, not everything that is needed. I would like to have more specifics and instructions when completing tasks”

“Problems with communication” (x 2)

“There are sometimes issues with miscommunication between the different projects and reception. For example, when reception book some clients in for appointments, they sometimes don’t look at the availability of the advisors carefully or they double book. On the other side, some advisors book some clients in themselves and forget to put this in their calendar”.

“I also think that due to the increased NCS targets since October, the advisors have to see more new clients before they can see a returning client. Due to the nature of our clients being those with many complicated cases, one appointment is not enough and many of them do have to come back. However, due to them already having NCS done, they have to wait longer to get an appointment once the advisors have reached their targets for the month”.

“Advisers having to focus so much on targets (NCS) and it means they have less time to support individuals. If this could be reduced then staff could focus more on listening and building relationships with service users”

“Funding uncertainty”.

“Database and processes need improving”

“We need more translators”

Other general comments

“The teaching of English is very necessary for the people here and I think it should be supported”

“The client's road to success is long and sometimes requires a lot of knowledge on the part of the counsellor, and the PBIC staff need to be continually trained”

“PBIC is needed to support people who are homeless, who are working, who have been rejected, who have fallen into various addictions and who need mental and psychological support.

“Sometimes the needs of our clients are beyond our capacity, but we do not refuse or deny help. We are here to help”

Feedback from Trustees

Questionnaires / surveys

The survey with PBIC Trustees was distributed in December. Survey forms were received back from five PBIC trustees. A summary of the responses is given below.

PBIC's general strengths

"Strong focus on individual client's needs above and beyond targets of particular programmes"

"Helping vulnerable migrants often in their native language with compassion"

"Building trust with clients, serving them with a holistic approach"

"Providing fantastic services to migrant community and holistic support to vulnerable clients"

"English teaching is delivered well and is very helpful for clients"

"Our client facing staff are accessible and are able to address the needs of so many vulnerable migrants using our free services. There is compassion and a human approach towards their work"

"I have always found the staff incredibly friendly and ways approachable"

"Staff are very committed to the objectives of the charity"

"Our use of able, qualified immigrants as volunteers and employees significantly improves our ability to support those communities. Ukrainian employees supporting the Ukrainian community is an example"

"Care and attention to the welfare of staff who are dealing with people in difficult circumstances. Recent support for mental health is an example"

"The CEO and founder is an all-inspiring woman who has driven forward the charity over the last 20 years or so with the support of a super committed Chair of Trustees"

"Real effort to engage with local and national organisations both to improve PBIC and to spread its own good practice"

PBIC's weaknesses (and things to improve)

"PBIC is a local organisation but it needs a wider reach to sustain itself; it is finding its way in this regard"

"PBIC would benefit from the appointment of a trustee with a strong background in accountancy and financial controls"

"It continues to move from its Polish/East European base to supporting clients of other nationalities. Currently this is most evident, I think, in the teaching of English"

"Fundraising from private individuals, or building relations with private corporations to receive extra help"

"It appears to me there is relative high staff turnover"

“Management and trustee communication with staff – but this is definitely improving”

“The need to add to PBIC’s management team”

“Too much rests on the CEO’s shoulders. We should have a deputy in place or a senior manager that can support Mags with the day-to-day running of charity, leaving more time for her to go out there to promote the charity, and forge new partnerships and opportunities”

“Sometimes the office can be very busy, which at times can mean a busy reception area”

Current (or future) challenges facing PBIC

“Let’s cut to the quick - funding! Current finances are very sound but there is a ‘gap’ just on the horizon. As for all charities, if funding cannot be found, PBIC will have to reduce its staffing and range of deliver”.

“Two big funds are ending in 2024, so cashflow might become an issue”

“New and reliable sources of funding are required to sustain recent PBIC growth”

“Sustainability is an obvious one, given the end of European funding and the lack of UKSPF in our area”

“There could be some issues funding wise on the horizon in the next couple of years. However, I have full faith in the extraordinary work that Mags and Nigel put in to reach out to the government and other potential investors”

“The workload for Mags (CEO) is likely to rise immensely following the departure of Rob (Project Manager). It would be good to hire a new manager to support Mags”

“There is a particular issue to do with the lease of the current offices which needs to be resolved”

“There is a new Mayor for Bedford; let’s see how this impacts on contacts with the Borough”

Ideas for future changes or developments for PBIC

“Hopefully (funding-allowing) PBIC can continue to deliver what it is doing now, ever refining, responding and improving”.

“We could train staff to achieve Level 2 immigration support for migrants (to give advice on passports, settlement etc)”

“We should continue to improve the provision of English teaching at different levels (from very basic to advanced), either directly, or through links with Bedford College etc.”

“One next step may be to work out how to have a wider regional/national role. This could be through further links with other charities/organisations to improve reach and delivery”

“There may be room for PBIC as an exemplar charity in its areas of expertise, to effectively provide ‘training for the trainers’ through its good practice”

“Increase our donor pool by reaching out to big and local cooperation. Do some research to find other donors”

“Consider employing a funding consultant”

“Develop the importance of the model of delivery of our services”

“It would be worth seeing if we can engage more with universities, the Horizon Programme and social innovation”

“As mentioned by staff, and agreed in the latest trustees meeting, periodical lunches with trustees and staff would benefit both groups in my opinion. For trustees it would give a good insight into who the staff are and give them an opportunity to converse and learn more about challenges faced daily by staff. Equally for staff I think this will give more of a ‘human approach’ to who trustees are and a background into the work that they do”

Other general comments

“My first contact with PBIC was as a volunteer, soon after I retired. Arrangements were haphazard and hand-to-mouth. However, I never doubted the passion, integrity and commitment of those in charge. PBIC has developed from a family mission helping fellow Poles and other Europeans, to a structured, well-run charity with a solid foundation and a broader reach. Nigel (Chairman) has been absolutely fundamental to this successful transition, as has Mags (CEO)”

Feedback from PBIC clients

Counting data

As PBIC encourages all of its clients to complete evaluation forms, I decided that it was not necessary to interview clients individually or set up any focus groups for clients as part of this evaluation.

PBIC collects good data from the general feedback it receives from clients, and this feedback is very positive. For example, the overall results from the PBIC’s annual data report (for April 2022 to March 2023) showed that:

- 99% of clients felt happier as a result of coming to PBIC
- 95% stated that PBIC’s support helped reduce anxiety on issues causing them distress
- 99% stated that they better understood their rights as a result of PBIC’s advice and support



Further details of this can be found on **Page 40**.

Separate feedback is also collected from PBIC’s ESOL learners (see **Page 50**) - and also its Ukrainian clients and its National Careers Service users. Again this is all very positive.

However, all of the feedback analysis that I saw during the evaluation is based on statistics gathered from tick box answers, with no quotes or written comments from clients appearing in any of the reports. Although it is more difficult getting comments (in English anyway) from clients whose first language is not English, I think it is a big gap, and in some ways PBIC clients almost seem not to have an individual voice in the feedback reports. So, I suggest that some thought is put into trying to get some actual responses and comments from clients. At the very least there should be a space on the feedback forms for comments. If getting comments on feedback forms is too difficult, perhaps some other ways of getting comments and quotes from clients could be tried eg interviewing a few random clients about their thoughts on PBIC and its services, or arranging some focus group meetings for clients to discuss things?

Suggestion for consideration 9

It is suggested that changes should be made to **PBIC's client feedback forms** to encourage, and allow, comments and quotes from clients – rather than just tick-box answers.

This will help give PBIC's clients a stronger voice in the feedback.

Feedback from external stakeholders

Interviews / individual discussions

During the evaluation I met with **David Brewer** (Senior Advisor) at the CVS in Bedford on 29th January 2024, and he kindly gave some personal feedback about PBIC.

Feedback from David Brewer (Senior Adviser at Bedfordshire CVS)

David explained that he had worked with PBIC over two separate periods in two different work roles.

From April 2009 to March 2012, David was the Head of Partnerships and Community Engagement at Bedford Borough Council. This was a busy and exciting time as the Council had become a new unitary authority following Local Government Re-organisation in Bedfordshire in 2009. David worked with the Polish British Integration Centre, along with a number of other local community organisations, to try to nurture good relationships between the voluntary and community sector and the new Council.

David commented that:

“From the outset, even when they were a fairly new, small group, I was very impressed by PBIC as an organisation and the work of its two leaders – Mags and Rob Brady. I found Mags to be a strong force of nature, but with a very personable and caring manner. I was very struck by Rob and Mags’ dedication and commitment in supporting the Polish community in Bedford”.

Feedback from David Brewer (continued)

David particularly remembered facilitating a meeting between the elected Mayor of Bedford (Dave Hodgson) and PBIC, and representatives from the local Polish community. He was very proud that the good, personal links that developed between the Mayor and Mags at PBIC continued to grow over the years and became a strong, long-term, working relationship. An example of this was when the Mayor and the Council approached PBIC to become the lead body in the initiative set-up by the Council to support Ukrainian refugees after the Russian invasion in 2022.

From 2012, David then worked away in Hertfordshire for 9 years before coming back to work again in Bedford when he joined the CVS in December 2021. In his new role as a Senior Adviser he soon started working with PBIC and Mags again, helped by the fact that the PBIC office is just across the road from the CVS. His first new work link with PBIC was to help facilitate the rental of an office for PBIC management staff at the CVS building. More recently he has met with Mags (PBIC CEO) and Nigel Rees (PBIC Chair) a number of times to discuss financial strategy and a range of funding opportunities including a significant funding bid to the Social Justice Unit and the National Lottery for the organisation including core costs. This led to David providing support to draft an Expression of Interest for the funding. If this first stage in the process is successful, David will be able to provide further support to PBIC with their bid.

Also, due to his links with, and trust in, PBIC, David asked PBIC to act as one of the “spotlight” case studies at the launch of the new Bedfordshire Trustees Network in November 2023, and this was a good success.

Coming back to work with PBIC again after a 9-year gap, David said he had noticed great changes in scale at PBIC. In 2009 PBIC was a small community group that had recently received its first funding and had just moved into its first proper office. By 2021, PBIC had grown into a very well established and respected local VCS organisation, with a strong delivery record in a number of large projects supporting the wider Eastern European communities, and now working with over £½ million a year turnover.

However, David was also impressed that many things had remained the same:

“Thankfully, despite the changes in scale, the underpinning ethos of PBIC as a caring and supportive organisation had remained the same. All of this was testimony to the commitment of Mags, and her values, which are evident in the way that she cares for PBIC’s users, and for the mental wellbeing of PBIC’s staff”.

The only concern raised by David was that, in the current funding environment, there will be a lot of pressure on PBIC to sustain its current financial position. Some of its main funding streams will end in the next year or so, and it will probably become even more difficult to get alternative funding at the same level. David suggested that PBIC may need to put some time and effort into developing a future funding and organisational model that will ensure PBIC’s sustainability.

David's feedback about PBIC is obviously very positive.



However, his point about the potential, growing difficulty in obtaining funding in the future is an important one. It is therefore very important that PBIC agrees at least a longer-term (3 year?) development and financial strategy – rather than just applying for funding as it comes up year by year.

Suggestion for consideration 10

PBIC should consider developing a 3-year funding and development strategy to give it some longer-term strategic planning.

To support its Careers-IAG work since 2011, PBIC has had a Matrix Quality Mark, which is the nationally recognised quality standard for organisations providing information, advice and guidance relating to careers, learning and work. Having the Matrix quality mark has enabled PBIC to obtain funding for various Careers-IAG initiatives and projects over the years.

While I was undertaking my evaluation, PBIC had an accreditation review visit for its Matrix award in December 2023. The Matrix assessor was **Kathy Leahy** (from The Growth Company).

Checking documents and records

PBIC successfully passed the assessment review and the Matrix accreditation has been awarded for a further 3 years until the next review in December 2026 – although, as is required, under the Matrix conditions, continuous improvement checks will be made remotely in the interim period in December 2024 and December 2025.

In her assessment report, the assessor, Kathy, identified a number of strengths that PBIC had:

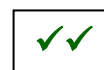
- The organisation has recognised that staff need very specific support to enable them to effectively support clients – many of whom have complex and demanding needs. This has led to implementing more creative/arts-based approaches to help staff describe the situations they have faced with managers describing being able to be more open about how they are feeling.
- Throughout the assessment, it was clear that staff engage effectively with clients to help identify, not only the presenting/immediate issue they are facing, but also help clients to 'open up' and describe the range of issues that may be affecting their life and ability to move forward. Staff then support clients to prioritise these identified needs, enabling them to manage their situation.
- There is a clear sense of 'wanting to do a good job' and focus on continuous improvement. Staff described how they review what and how they deliver services on an ongoing basis to benefit the individuals they work with. They recognise that clients have multiple barriers, and they take pride in helping them to overcome these and move forward."

- There were two words that were consistently repeated throughout the assessment, these were 'listening/listen' and 'trust'. There is a recognition of the level of listening that is overwhelmingly appreciated by clients; and the trust was mentioned by both clients and partners as a key aspect of their relationship with PBIC.

Kathy also identified some areas for development including:

- Exploring funding opportunities for health focused projects
- Reviewing cross-service themes to identify good practice and areas for development at PBIC
- Exploring potential quality awards covering wellbeing at work
- Exploring employability qualifications for staff, and other CPD ideas for staff

However, none of the above developmental ideas were seen as weaknesses, and the overall feedback from Kathy was very positive.



In addition to my role as evaluator in this evaluation of PBIC, wearing a different hat, I am also in a position to provide feedback as a local stakeholder of PBIC, through my work with **Bedfordshire Advice Forum** (BAF) – which is the network for social welfare information and advice providers in Bedford Borough and Central Bedfordshire.

I have been closely involved with BAF for 25 years as a consultant, project worker, trainer, and, since 2007, as Company Secretary for BAF's trading company, Advice Bedfordshire. PBIC joined BAF when PBIC was opened in 2007, and has been a long-term member and supporter of BAF since then.

Like David Brewer (see **Pages 70-71**), I got to know Mags and Rob Brady in the early days of the Polish British Integration Centre, and was very impressed by their commitment in wanting to support the local Polish community, and starting PBIC.

Mags was a regular attender of BAF's Forum meetings which help to promote the local advice sector, and which provide a great opportunity for networking in the sector. As a new agency Mags and Rob (and PBIC) were very interested in the Q-cas project, which I managed, to develop a local quality mark for information and advice providers. Mags joined the Q-cas Consultation Group in 2010 and PBIC then went on to take part in the pilot training programme for Q-cas, which set the base for PBIC's development as a more formal advice provider. Through Mags's hard work PBIC obtained the Level 1 Q-cas quality mark in 2011, followed by progression to the Level 2 Q-cas award in 2012.



Q-cas Award Ceremony
March 2011

In the following years PBIC has remained an established member of BAF, and it was good that Mags and Nigel (PBIC Chair) came to give a presentation (at BAF's AGM in June 2022), on PBIC's dew work in supporting the influx of migrants from Ukraine, following the Russian invasion.



Checking documents and records

However, one issue I have noticed over the more recent years is that, as PBIC's Careers-IG work has increased, PBIC has become more actively involved in Careers-IG networks, and less involved in BAF's social welfare advice network. For example, Mags has not been a frequent attendee at BAF's Forum meetings, no PBIC advisers attend BAF's Benefits Network meetings, and PBIC staff have not attended BAF's training courses for quite a while. This is not only a shame, but also a surprise, as this evaluation work has shown that PBIC's social welfare advice service is still a core part of PBIC's services to the community.



Suggestion for consideration 11

PBIC should consider re-developing closer **links with Bedfordshire Advice Forum (BAF)** to help strengthen PBIC's social welfare advice services – which are a core part of its public offer.

4.6 Other general comments about PBIC

During the evaluation I collected various evidence relating to PBIC generally as an organisation. In **Sections 4.2–4.5** above I have reported on the issues that directly related to the You are Valued Project. However, to help PBIC in its future development, I have also passed on, in a separate report, a summary of the wider evidence collected, and some suggested action for future consideration.

These other developmental suggestions covered issues relating to:

- PBIC's Reception Service
- PBIC's policy for dealing with difficult clients
- The methods used by PBIC to collect client feedback
- PBIC's management structure
- The logo and branding used by PBIC
- The geographical residency of PBIC clients
- PBIC's governance

5. CONCLUSIONS AND SUGGESTIONS FOR CONSIDERATION

5.1 Conclusion

In this evaluation I have used various evaluation techniques to evaluate PBIC's 5-year, "You are Valued" work which is being funded by the National Lottery Community Fund.

Within the work I have evaluated:

- Project outcomes
- Project finances
- Work activities
- Other issues relating to the funded work and PBIC as an organisation

Full details of the evaluation results can be found in **Section 4** of this report.

The **overall conclusion** of my evaluation is that:

PBIC's You are Valued project has been a big success and PBIC has used its grant effectively, resulting in significant positive outcomes for large numbers of clients.

The progress made in terms of the **13 change indicators** (which are used to measure the project outcomes in the YAV Project) are almost all very impressive and the **headline figures** from the data presented in the reports to the National Lottery (in the first 3½ years of the funding up until the end of September 2023) are:

- Over 1,100 PBIC clients have already reported that they:
 - have been listened to and their issues were taken seriously;
 - feel happier as a result of their interaction with PBIC
 - have reduced anxiety on issues which caused distress
- Over 1,200 people have improved their English language skills through attending PBIC courses
- Over 300 PBIC clients have moved from being unemployed or inactive into employment
- 4,000 people have participated in volunteer led events organised by PBIC
- Over 5,000 people have benefitted from multilingual advice at PBIC
- Over 1,000 people have reported that they have:
 - better understanding of their rights
 - increased confidence in accessing mainstream services independently

Very positively, in terms of the **project outcomes**, some of the results achieved have already exceeded the overall 5-year targets for the project.

Therefore, it can safely be said (even if there are some queries about how some of the data has been during the project) that 3 of the 4 outcomes for the project should be easily met by the end of the project. These are:

Outcome 1: The mental wellbeing of migrants will be improved

Outcome 2: Migrants will move towards fulfilling their employment potential as a result of culturally tailored careers advice and English language provision

Outcome 4: Migrants will gain awareness of their rights and increase confidence in their ability to manage their own problems as a result of competent, multilingual advice

Regarding **Outcome 3** (Better integration through volunteering) my evaluation concluded that there was a reasonable chance that the targets will be met by the end of the project but some further progress needs to be made on **Indicator 8** (People engaging in volunteering placements) and some evidence for **Indicator 9** (People reporting that their volunteering placements have developed skills and knowledge which allow them to better integrate within British society) should be obtained.

It should be noted that the reason for the under-performance in **Indicators 8 and 9** was due to a change in focus, as the project developed, away from using volunteers at PBIC to using more paid staff – mainly because of the growing complexity in the work needed (and the training required) to support clients effectively. However, despite this change of focus, it is still important to at least get some more feedback (for **Indicator 9**) from any volunteers used at PBIC during the project.

The evaluation also confirmed that the **project finances** have been well planned and monitored throughout the project and expenditure has been kept within budget.

I looked in detail at the **range of services** that PBIC has provided using the National Lottery grant - especially focussing on the services that have had a direct impact on the project outcomes. These are the:

- Advice Services
- ESOL Service
- Listening Service

In doing this I made various visits to PBIC for meetings and observations, and collected really positive data, feedback and case studies about this direct client work.

Although not funded directly by the You are Valued funding, it should be noted that as the YAV funding is major, 5-year, core funding for PBIC, just by having this grant (and helping PBIC grow, and build its reputation and funding base), the YAV funding has helped all of PBIC's other services in an indirect way.

It is clear that all of **PBIC's services** are well respected and provide many benefits for PBIC's clients and their families, and the wider community. The services directly help Eastern European and other migrants in Bedfordshire (especially those living in Bedford Borough) to have an improved quality of life, and experience less isolation. PBIC's services I am sure also help the local community (especially in Bedford Borough) to be more cohesive.

I completed the evaluation by looking at some **other issues** relating to the project and to PBIC covering:

- Project reporting
- PBIC policies
- General feedback about PBIC as an organisation

There was also lots of evidence of good practice in all of the above.

The **feedback from clients** about PBIC's services was generally extremely positive. For example:

- 100% of clients felt listened to by their adviser
- 99% felt happier as a result of coming to PBIC
- 99% stated that they better understood their rights as a result of PBIC's advice and support

And, more specifically, the same level of positive responses came back from the learners on **PBIC's English courses**. For example,

- 100% of learners enjoyed their learning
- 100% were happy with the programme provided by PBIC
- 100% were happy with the materials and lessons

A few quotes from clients (from **PBIC's 2023 Matrix assessment report**) sum up the depth of positive findings about PBIC:

"It was a question of life and death. They saved me from depression – it was step by step. I was given help"

"Without PBIC I wouldn't be able to do anything – they are so supportive and welcoming"

And a summary of the **key strengths** of PBIC that were identified in the feedback from staff, trustees, and from external stakeholders, gives a good indication of how well PBIC is respected.

“Changing people’s lives for the better”

“Often people come to us who have lost hope, so we try to do everything possible to relieve emotional stress.”

“Holistic approach, and real interest in people’s needs”

“Active listening is one of the central planks in our service provision – and there is now a growing focus on this, holistic support for clients and the ‘client journey’”

“Staff engage effectively with clients to help identify, not only the presenting/immediate issue they are facing, but also help clients to ‘open up’ and describe the range of issues that may be affecting their life and ability to move forward”

“Two words that were consistently repeated throughout the Matrix assessment were ‘listening/listen’ and ‘trust’.”

“We are determined to help every person that comes through our doors as much as we can”

“Can do attitude”

“Always ready to help”

“No one is turned away”

“There is a clear sense of wanting to do a good job”

“Providing fantastic services to migrant community and holistic support to vulnerable clients”

“I have always found the staff incredibly friendly and always approachable”

“Reception staff speak 4 languages (English, Polish, Ukrainian, Russian) and give a friendly and warm welcome to every client”

“Professional, committed, and empathetic advisors – doing everything they can to solve their problems”

“The ESOL service gives an individual approach to each student”.

“The Listening Service helps people to feel relief, feel listened to, upload their thoughts and feelings”

“Outstanding management”

“The CEO and founder is an all-inspiring woman who has driven forward the charity over the last 20 years or so with the support of a super committed chair of Trustees”

“I found Mags to be a strong force of nature, but with a very personable and caring manner”.

So, all in all, given that PBIC is a relatively small local community organisation, the success of the You are Valued funded project has been a remarkable achievement.

Of course, in any in-depth evaluation of this sort, there will always be some **queries and less positive comments** about a variety of things (which have been covered in detail in **Section 4** of this report). However, this is just a natural outcome of a robust and challenging evaluation. The important thing for an organisation (and its trustees, staff and volunteers) is to view these less positive comments as positive opportunities to improve current weaknesses and to introduce new initiatives to help the organisation develop into an even more successful organisation.

I have listed **11 suggestions for consideration** (see below) for future action that were made during the evaluation. Some of these suggestions have already been taken forward, and details of this work is given in the **Appendix** to this report, which has been added (in July 2024) to the report which was initially drafted in February 2024.

5.2 Suggestions for consideration

In the evaluation a number of issues were identified where changes or minor refinements could be made to enhance PBIC and its work.

In **Section 4** of this report, **11 suggestions for consideration** were made to address the identified issues.

Suggestions for consideration	
It is suggested that:	
1	<p>Immediate focus should be given to getting some feedback or data from PBIC volunteers about their volunteer placements. This will provide evidence to support Indicator 9 and Project Outcome 3.</p> <p>This feedback could be gathered in different ways - by a written survey, or online through Survey Monkey, or through just organising a focus group or meeting of the volunteers.</p>
2	<p>For clarity, a fuller explanation of how the project data is collected and analysed at PBIC should be added to the future National Lottery End of Year Reports.</p> <p>It is also suggested that extra data for Indicator 11 should be presented to show both the total number of enquiries and the number of unique clients that have been helped.</p>
3	<p>PBIC should review and simplify the structure and descriptions of its advice services.</p> <p>My suggestion is to clearly promote two different types of advice as two different services at PBIC - Social Welfare Advice and Careers IAG.</p>
4	<p>PBIC should review the classification of the different types of social welfare advice that it provides.</p> <p>The current data is a little confusing and not detailed enough to give a better picture of the wide range of advice being given.</p>

Suggestions for consideration	
It is suggested that:	
5	<p>PBIC should consider applying for the Advice Quality Standard for its social welfare advice service.</p> <p>If this is a challenge, due to limited resources, at least, PBIC should plan and oversee its social welfare advice services so that PBIC is working to the AQS standards.</p>
6	<p>PBIC tutors should consider developing their own training materials that can be branded as PBIC training resources.</p> <p>This would make the ESOL training activities more relevant to PBIC's learners, and give PBIC extra prominence as a learning provider.</p>
7	<p>PBIC should consider inserting a link to PBIC's key policies (especially those directly affecting clients) on the PBIC website.</p>
8	<p>PBIC should consider ensuring that its range of policies not only covers PBIC's general work as a community organisation, but that the policies also support some of its specific work activities – especially its core advice services.</p> <p>Policies for PBIC's advice services should include:</p> <ul style="list-style-type: none"> • Adviser induction and training • Conflict of interest • Case management • Signposting and referral • Independent file review <p>To support any new (or enhanced) policies, developing an Advice Manual and providing some staff training on particular issues should also be considered.</p>
9	<p>PBIC should consider changing its client feedback forms to encourage, and allow, comments and quotes from clients – rather than just tick-box answers.</p> <p>This will help give PBIC's clients a stronger voice in the feedback.</p>
10	<p>PBIC should consider developing a 3-year funding and development strategy to give it some longer-term strategic planning.</p>
11	<p>PBIC should consider re-developing closer links with Bedfordshire Advice Forum (BAF) to help strengthen PBIC's social welfare advice services – which are a core part of its public offer.</p>

NB I am glad to report that some of the above suggestions have been acted upon already, and details of this are given in the **Appendix** to this report..

It should also be said that there were a few **recurring concerns** that were brought up in the staff and trustee feedback that need to be noted. I have not made specific suggestions about these issues because they are very reliant on finances and resources, and may not be easily resolved. But the concerns should still be noted – especially as I believe some of them are starting to sap staff morale.

- There is a lack of office space at PBIC
- The targets and paperwork involved in some funding contracts are excessive
- There is a lack of Bulgarian and Romanian interpreters
- Demand for English courses is out-stripping supply – and places on courses cannot be provided by PBIC for all clients that need a course
- PBIC's Project Manager leaving his role (at the end of 2023) may result in a gap in management support which could have an impact on services
- Luton residents have not been supported by the YAV project as originally planned

Some of the more urgent suggestions for consideration (**Suggestions 1, 2, 6, 7, 8, 9 and 11**) could help PBIC to enhance the success of the You are Valued Project in Year 5 (the final year) of the National Lottery funding. So, hopefully these suggestions could be considered quickly to try to resolve the issues identified.

However, some other suggestions for consideration (ie **Suggestions 3, 4, 5, and 10**) are more about longer-term issues and could be taken forward later.

This report can also be used as **evidence to support any future bids** to the National Lottery for further funding from 2025 onwards, and in applications to any other funders.

If required, **Infotrain could help PBIC to move forward** by providing further clarification, advice or support on any of the suggestions given.

APPENDIX

UPDATE (JULY 2024) SINCE INITIAL DRAFT OF THE EVALUATION REPORT

Background

Most of the evidence for the evaluation of PBIC was collected in late 2023, with a few extra bits of work done in January 2024.

The work on writing the initial draft report was then started in February 2024, but presentation of the draft report to Trustees at a planned Board meeting on 17th February had to be postponed, and a new deadline was set for May. Some further work was then done on the evaluation report.

Unfortunately, only a few Trustees were able to attend the Board meeting planned for 18th May, so it was decided to postpone the presentation of the final report again until 20th July.

The delays in presenting the final report have enabled various amendments to be made to the original draft report, and various new evidence has become available in the meantime. To keep things as simple as possible the original findings of the evaluation (see **Section 4** of this report) and the conclusion and suggestions for consideration (see **Section 5**) have been left as they were. An **Appendix** has then been added to the report to give an update on developments since February.

Update on project outcomes

In the original draft of the evaluation report, the analysis of the project outcomes (see **Section 4.2**) was based on data covering Year 3 of the project and the first 6 months of Year 4 (up until September 2023).

Data for the final 6 months of Year 4 (up until March 2024) is now available, and an End of Year Report for Year 4 was sent by PBIC to the National Lottery in April.

As much of the PBIC data is based on responses by clients to surveys, whether the data for the outcomes has changed depended on when different surveys were undertaken. And, in fact, the data presented for some outcomes is exactly the same in March 2024 as it was in September 2023.

The updates on the individual project outcomes can be found on the pages below.

Project outcome 1: Improved mental wellbeing

Change indicators	Revised target figures	Cumulative progress
1. People reporting they were listened to and their issues were taken seriously	700	End of Year 3 (March 2023): 846 Mid-Year 4 (September 2023): 1,209 End of Year 4 (March 2024): 1,508
2. People reporting feeling happier as a result of their interactions with PBIC's staff and volunteers	1,050	End of Year 3 (March 2023): 836 Mid-Year 4 (September 2023): 1,221 End of Year 4 (March 2024): 1,499
3. People reporting reduced anxiety on issues which caused distress	1,050	End of Year 3 (March 2023): 745 Mid-Year 4 (September 2023): 1,114 End of Year 4 (March 2024): 1,390

Further progress has been made for **Outcome 1** – for **Indicators 1, 2 and 3**.

The update is:

Indicator 1 – The revised 5-year target, and the original target, were already exceeded by September 2023. The numbers have continued to rise in the second 6 months of Year 4.

Indicator 2 - The revised 5-year target was already exceeded by September 2023. The numbers have continued to rise in the second 6 months of Year 4, and the original target is now almost met.

Indicator 3 - The revised 5-year target was already exceeded by September 2023. The numbers have continued to rise in the second 6 months of Year 4.

Project outcome 2: Fulfilling employment potential

Change indicators	Revised target figures	Cumulative progress
4. People improving their English language skills	538	End of Year 3 (March 2023): 771 Mid-Year 4 (September 2023): 1,293 End of Year 4 (March 2024): 1,536
5. People reporting feeling closer to fulfilling their employment potential	320	End of Year 3 (March 2023): 506 Mid-Year 4 (September 2023): 798 End of Year 4 (March 2024): 1,095
6. People moving from being unemployed or inactive into employment	160	End of Year 3 (March 2023): 198 Mid-Year 4 (September 2023): 307 End of Year 4 (March 2024): 375
7. People moving from unskilled work to employment where they can utilise their skills	160	End of Year 3 (March 2023): 82 Mid-Year 4 (September 2023): 117 End of Year 4 (March 2024): 162

Some further progress has been made for **Outcome 2** – for **Indicators 6 and 7**.

The update is

Indicator 4 - The revised 5-year target, and the original target, were both already exceeded by the end of September 2023. The numbers have continued to rise in the second 6 months of Year 4.

Indicator 5 - The revised 5-year target, and the original target, were both already exceeded by the end of Year 3. The numbers have continued to rise in the second 6 months of Year 4.

Indicator 6 - The revised 5-year target, and the original target, were already exceeded by the end of September 2023. The numbers have continued to rise in the second 6 months of Year 4.

Indicator 7 - The numbers have continued to rise in the second 6 months of Year 4, and the revised 5-year target has now been exceeded.

Project outcome 3: Better integration through volunteering

Change indicators	Revised target figures	Cumulative progress
8. People engaging in volunteering placements	90	End of Year 3 (March 2023): 35 Mid-Year 4 (September 2023): 71 End of Year 4 (March 2023): 71
9. People reporting that their volunteering placements have developed skills and knowledge which allow them to better integrate within British society	90	End of Year 3 (March 2023): 22 Mid-Year 4 (September 2023): 22 End of Year 4 (March 2024): 58
10. People participating in volunteer led events promoting volunteering	2,400	End of Year 3: 2,600 Mid-Year 4 (September 2023): 4,100 End of Year 4 (March 2024): 5,600

Some further progress has been made for **Outcome 3** – for **Indicators 9 and 10**.

Indicator 8 - There has been no change in the number in the second 6 months of Year 4, and the number is still below the revised 5-year target. However, with data from Year 5 of the project still to be added, there is still a small chance that the target will be met.

Indicator 9 – Some good progress has been made in the second 6 months of Year 4 and the number has risen. However, the cumulative total is still quite a way below the revised (and original) 5-year target, and it is unlikely that the target will be met.

Indicator 10 - The revised 5-year target, and the original target, were already exceeded by September 2023. The numbers have continued to rise in the second 6 months of Year 4.

Although the targets for **Indicators 8 and 9** may not be met, it should be noted that, as the project has developed, there has been a move of focus away from using volunteers at PBIC to using more paid staff – mainly because of the growing complexity in the work needed (and the training required) to support clients effectively. However, nevertheless, some work should be done to try to increase the numbers for both indicators in Year 5.

Project outcome 4: Awareness of rights and increased confidence

Following **Suggestion 2** (see **Page 80** in the report), further work has recently been done at PBIC to improve how the data for Outcome 4 is analysed. This work has made the data more robust in measuring Indicators 11, 12 and 13, and has given information about the unique number of clients helped for Indicator 11. This is a very good step in improving practice.

The amended data for Outcome 4 is given below.

Change indicators	Revised target figures	Cumulative progress
11. People benefitting from multilingual advice	1,800	End of Year 3 (March 2023) Number of enquiries: 3,738 Unique number of clients helped: 1,999 End of Year 4 (March 2024) Number of enquiries: 5,242 Unique number of clients helped: 3,822
12. People reporting better understanding of their rights	1,200	End of Year 3 (March 2023): 701 Mid-Year 4 (September 2023): 971 End of Year 4 (March 2024): 1,362
13. People reporting more confidence in accessing mainstream services independently	1,200	End of Year 3 (March 2023): 669 Mid-Year 4 (September 2023): 932 End of Year 4 (March 2024): 1,323

The amended data shows that further progress has been made for **Outcome 4** – for **Indicators 11, 12 and 13**.

Indicator 11 – Clearer data for this indicator is now available. The revised 5-year target, and the original target, were both already exceeded by the end of Year 3 for the number of enquiries **and** for the number of unique clients helped. This is very positive. The numbers have continued to rise for both totals in Year 4.

Indicator 12 - Some good progress has been made in the second 6 months of Year 4 and the numbers have risen. The original and revised 5-year targets have now been exceeded.

Indicator 13 - Some good progress has been made in the second 6 months of Year 4 and the numbers have risen. The original and revised 5-year targets have now been exceeded.

Update on suggestions for consideration

Suggestions for consideration (Originally drafted in February 2024)		Update (July 2024)
1	<p>Immediate focus should be given to getting some feedback or data from PBIC volunteers about their volunteer placements. This will provide evidence to support Indicator 9 and Project Outcome 3.</p> <p>This feedback could be gathered in different ways - by a written survey, or online through Survey Monkey, or through just organising a focus group or meeting of the volunteers.</p>	<p>A good report with feedback from 10 previous volunteers on their progress has been produced. All 10 volunteers (100%) reported that their volunteering placements have developed skills and knowledge which allow them to better integrate within British society. There was also a volunteer case study (about Alina) which supplemented the feedback report. This is all really good evidence for Indicator 9.</p>
2	<p>For clarity, a fuller explanation of how the project data is collected and analysed at PBIC should be added to the future National Lottery End of Year Reports.</p> <p>It is also suggested that extra data for Indicator 11 should be presented to show both the total number of enquiries and the number of unique clients that have been helped.</p>	<p>In the End of Year Report for Year 4 various extra details have been added that explain how the project data has been collected eg feedback obtained from a list of varied sources; the specific number of clients who have completed the feedback surveys is given for the outcomes; and details of the results from the volunteer survey is given. I see this as improved practice in project reporting.</p> <p>For Indicator 11, extra data has been presented as suggested (see Page 87 of the report).</p>
3	<p>PBIC should review and simplify the structure and descriptions of its advice services.</p> <p>My suggestion is to clearly promote two different types of advice as two different services at PBIC - Social Welfare Advice and Careers IAG.</p>	<p>PBIC's Chair has informed me that this is being reviewed in relation to embedding active listening and improving the focus on access to legal services.</p>
4	<p>PBIC should review the classification of the different types of social welfare advice that it provides.</p> <p>The current data is a little confusing and not detailed enough to give a better picture of the wide range of advice being given.</p>	<p>PBIC's Chair has informed me that this suggestion is being considered for the near future.</p>
5	<p>PBIC should consider applying for the Advice Quality Standard for its social welfare advice service.</p> <p>If this is a challenge, due to limited resources, at least, PBIC should plan and oversee its social welfare advice services so that PBIC is working to the AQS standards.</p>	<p>PBIC's Chair has informed me that this suggestion is being considered for the near future.</p>

Suggestions for consideration (Originally drafted in February 2024)		Update (July 2024)
6	<p>PBIC tutors should consider developing their own training materials that can be branded as PBIC training resources.</p> <p>This would make the ESOL training activities more relevant to PBIC's learners, and give PBIC extra prominence as a learning provider.</p>	<p>PBIC's Chair has informed me that this suggestion has been noted. PBIC is participating in ESOL conferences and consultations already and implement materials recommended by ESOL specialists on an ongoing basis.</p>
7	<p>PBIC should consider inserting a link to PBIC's key policies (especially those directly affecting clients) on the PBIC website.</p>	<p>PBIC's Chair has informed me that this suggestion will be implemented in due course.</p>
8	<p>PBIC should consider ensuring that its range of policies not only covers PBIC's general work as a community organisation, but that the policies also support some of its specific work activities – especially its core advice services.</p> <p>Policies for PBIC's advice services should include:</p> <ul style="list-style-type: none"> • Adviser induction and training • Conflict of interest • Signposting and referrals • Case recording • Independent file review <p>To support any new (or enhanced) policies, developing an Advice Manual and providing some staff training on particular issues should also be considered.</p>	<p>A very good updated Conflict of Interest Policy, which covers advice work issues, was agreed by the Board of Trustees at its meeting on 17th February.</p> <p>PBIC's Chair has informed me that a draft case management policy (including signposting and referrals, and independent file review) will be ready soon.</p>
9	<p>PBIC should consider changing its client feedback forms to encourage, and allow, comments and quotes from clients – rather than just tick-box answers.</p> <p>This will help give PBIC's clients a stronger voice in the feedback.</p>	<p>PBIC has recently produced a report on its Multilingual Survey in March 2024. This report includes various comments from clients in the survey.</p>
10	<p>PBIC should consider developing a 3-year funding and development strategy to give it some longer-term strategic planning.</p>	<p>PBIC's Chair has informed me that PBIC has a 5 year funding forecast which will be reviewed in 2025.</p>
11	<p>PBIC should consider re-developing closer links with Bedfordshire Advice Forum (BAF) to help strengthen PBIC's social welfare advice services – which are a core part of its public offer.</p>	<p>PBIC recently made a number of bookings onto BAF's Spring 2024 Training Programme. 5 advisers attended the "Overview of Universal Credit" course; 4 attended the "Introduction to Housing Status" webinar; and 5 attended the "Universal Credit – Managed Migration" course.</p>

Other recent updates

New funding

PBIC has recently received funding from The Access to Justice Foundation through their Improving Lives Through Advice (ILTA) grant programme, which is supported by the National Lottery Community Fund. This 5-year funding will help PBIC develop its social welfare advice services with a general aim of improving access to legal services for marginalised communities.

Rob Burton

Very sadly, Rob Burton (PBIC's Project Manager until December 2023), passed away in June. I had a number of meetings with Rob last autumn and he helped me considerably when I was building up my knowledge of PBIC and collecting different evidence for the evaluation. He will be greatly missed in the local community sector in Bedford and Luton. This report is dedicated to the memory of Rob.