

Occupational Standards for Economic Development

Management Challenges in Local Economic Development

Organisations asking...

- How can we ensure that our partnerships really do make a difference?
- Do we have the capacity to deliver our partnership commitments?
- How can we increase our impact and influence?
- What do we need to do to improve our track record in securing resources?
- How can we work better with local communities?
- What can we do to get local businesses more actively involved in our activities?

Managers asking...

- How do we ensure that we are doing the right things and doing things well?
- How do we ensure that everybody is clear about what is expected of them, and that we work to common standards?
- How do we make sure that we recruit and retain the right people for the job?
- How do we ensure that staff perform effectively – with a minimum of stress - and achieve their potential?
- How do we ensure that we succeed in satisfying the needs of our clients and customers?
- What are our priorities within the team for training and development?

These were questions in the minds of a number of TECs, local authorities and their public, private and community partners when they embarked on a recent series of National Development Agenda projects sponsored by the Department for Education and Employment.

These partners were attracted by the potential of a draft set of **occupational standards** – standards of competence – for organisations and individuals engaged in **local economic development**.

The pilot projects have demonstrated how such standards offer a robust means for tackling these questions - and more...

The Projects

Kent	▪ developing partner skills, knowledge and ways of working through the <i>Kent Partners Skills Programme</i>
Merseyside	▪ assessing the standards for use in <i>community/ local economic development</i>
Somerset	▪ reviewing and taking forward the <i>Somerset Economic Partnership</i>
West Yorkshire	▪ testing the standards in meeting the needs of four <i>Training and Enterprise Councils</i>

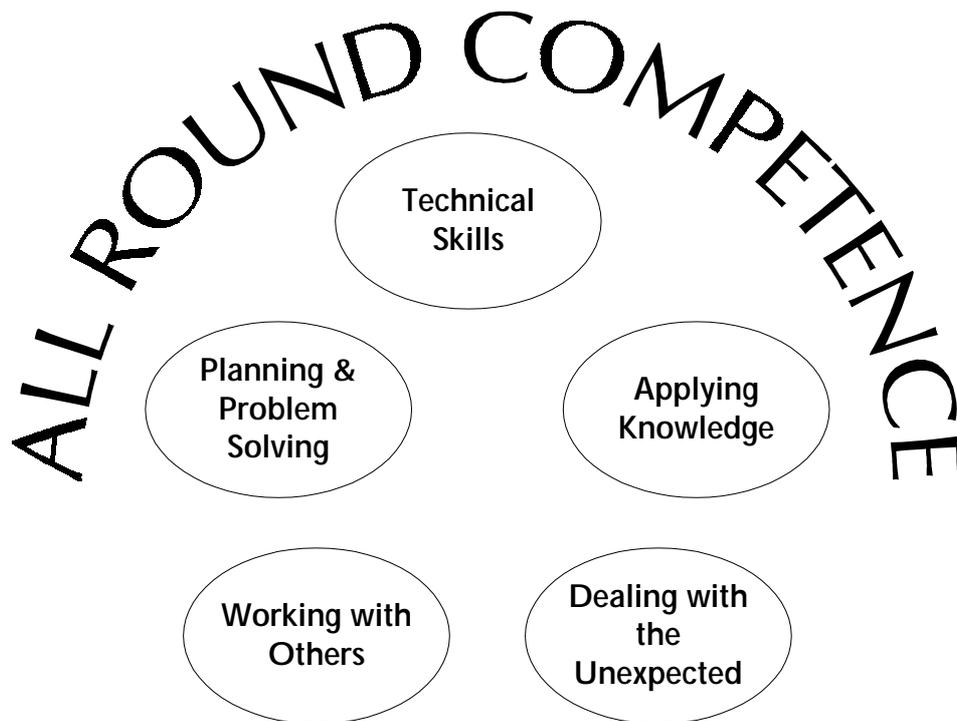
What Are Occupational Standards?

At the heart of occupational standards is a **way of thinking** about managing performance and developing professional capabilities.

Occupational standards define what's required of teams and individuals for all-round competence.

Occupational standards focus on what people are expected to achieve within essential parts of their job. They are concerned not just with what you know but also with what you do with it and how well you work with others to get things done.

Occupational standards provide a consistent means for assessing performance and identifying what people need to learn.



For example, an individual acting as project manager for a sector initiative is likely to need, *for effective performance*, a blend, which might include:

- relationship and consensus building skills
- strategy and project development expertise
- sector knowledge
- understanding of the interests and motivations of key players
- an eye for opportunities

How Occupational Standards Link With Strategy

Occupational standards are derived by analysing all the roles and functions that organisations and partnerships need to undertake if they are to achieve their goals and objectives.

As a result, the standards provide a **rigorous basis for reviewing roles and responsibilities** within any team, organisation or partnership.

Developed with Practitioners

The draft framework was produced in consultation with representatives of key organisations and practitioners themselves. It reflects not only how performance requirements have developed in recent years but also anticipates future needs. Each standard embodies **good practice** and provides a **tool for benchmarking** - not only for reviewing current practices but also for reflecting on the implications of changing circumstances and the emergence of new, more effective techniques. Within the framework there is a strong emphasis on requirements, which relate to partnership working.

What Ground Do The Standards Cover?

The standards are grouped in four broad work roles (see Figure 1 below):

- strategy development and strategic management
- project and service development, research, evaluation, etc
- operational management
- service delivery

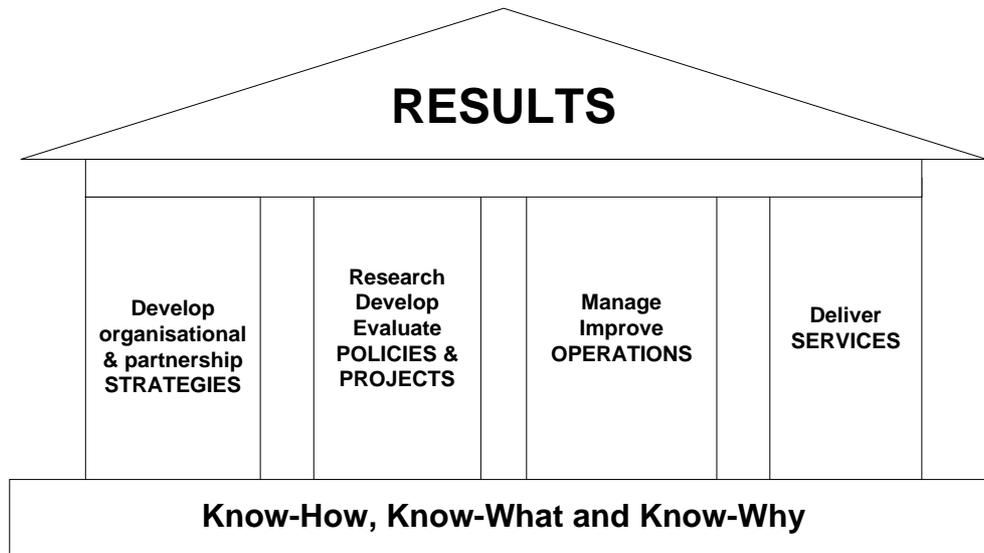
The process involved reviewing, “what do we *need* to be able to do to perform effectively?”, breaking down the broad roles into chunks or units of activity and standards for performance you can assess.

The framework links, where relevant, with occupational standards found in existing NVQs (such as Management Standards produced by the Management Charter Initiative) and professional bodies, with other standards developed to meet the particular requirements of economic development work. Considerable attention has been paid to defining the underpinning knowledge and skills that people need to work effectively in this field.

At its most detailed level, the framework sets out standards which provide:

- a precise description of what is to be achieved
- the standard to which it has to be carried out
- the means by which we can tell that it has been met

Figure 1 Structure of the Economic Development Standards Framework



for example: EU policies & programmes; urban & rural regeneration; business development; inward investment; community economic development; skills training; access to jobs

Results require organisations, teams and individuals to excel in these work areas, achieving standards of competence in each.

Teams and individuals need the knowledge as well as the relevant skills and behaviour to meet these standards consistently.

Standards and Managing Change

Occupational standards can act as a **building block** for managing change and continuously seeking to improve performance. They help integrate and strengthen approaches to recruitment, training and appraisal, and contribute to achievement of organisational quality standards such as Investors in People, the Business Excellence Model and ISO 9000. They can be thought of as **quality standards for people**.

Standards, Training & Qualifications

Occupational standards are used most commonly in training activities and form the basis of National/ Scottish Vocational Qualifications. As such, they conform to a national model designed for consistent, objective assessment.

They provide a sound, work-based method of identifying **team and individual development needs** and **designing training** and other forms of learning. They offer flexible routes to attaining qualifications, recognising capabilities developed through previous experience and training. They can also be tailored to meet the distinct needs of different types and sizes of organisation, be they in the public or voluntary/ community sectors or partnerships.

Testing the Draft Standards Through National Development Agenda Projects

Having supported the development of the framework of draft standards, the Department for Education and Employment wanted to see the standards used in a range of practical situations.

The most useful – and robust – standards come about from rigorous field testing, rather than simply a consultation process. How do they work in practice? How easy are they to understand? Can users see their relevance to their own particular needs?

This approach also helps people who are unfamiliar with occupational standards explore their practical applications and assess the value they may offer in the form of competence-based qualifications.

Potential Applications of Standards
<ul style="list-style-type: none">• partnership/ team building• organisational review• defining jobs• training needs analysis• appraisal• continuing professional development• recruitment, selection and induction• training design and evaluation• benchmarking• setting internal and supplier quality standards

Who Can Find the Standards Relevant?

The DfEE wished to see the standards tested by people from a wide range of organisations engaged in local economic development, such as:

- ◆ local authorities
- ◆ public/ private partnerships
- ◆ regeneration initiatives
- ◆ community & voluntary organisations
- ◆ Training and Enterprise Councils
- ◆ public agencies
- ◆ European policy and programme teams
- ◆ central government departments and Government Offices for the Regions
- ◆ enterprise agencies and other business support agencies
- ◆ community-based development agencies
- ◆ business development arms of further and higher education institutions

The case studies which follow describe how the objectives of each project, drawing out the use of the standards, outcomes and key lessons.

Kent Partners Skills Programme

Project features

- strategic approach, treating skills, knowledge and ways of working in partner organisations as a priority
- use of standards in:
 - ◆ identifying training & development needs
 - ◆ designing training
 - ◆ reviewing roles & responsibilities
- application – and outcomes - across range of partnership areas (inward investment, sector development, managing partnership projects, etc)
- all activities geared to addressing performance issues and ensuring more effective collaboration

What did the project set out to do?

Kent Prospects (economic development strategy) and Kent Learning (lifetime learning strategy) were launched in July 1996. Their development was driven by Kent TEC and Kent County Council (KCC), working with a very wide range of interests and accountable for progress to the Kent Economic Forum and the Kent Forum for Lifetime Learning.

Following consultation, there was agreement amongst partners that skills, knowledge and competence in partner organisations should be treated as a strategic issue. The Programme has been taken forward by one of a number of partnership groups charged with specific responsibilities in relation to the two strategies. Personnel and training specialists are involved, as well as economic development practitioners.

The Partners Skills Programme has the goal of *building capacity* of partner organisations. It is concerned with both:

- *individual* capacity: the capability of partner staff and representatives to perform effectively, now and in the future
- *institutional* capacity: a function of organisational/ partnership resources, systems, culture and ways of working

The two cannot be separated, as the performance of individuals depends on organisational factors, and the performance of organisations depends on the quality of their staff. Ultimately, the Skills Programme is to be judged by the contribution it makes to delivering the Kent Prospects and Kent Learning strategies, providing high quality services, supporting regeneration, and enhancing Kent's competitive edge in economic development.

This Skills Programme is not about developing a series of off-the-job training courses. Rather it is about building training and development activities into a range of work priorities where continuous improvement in performance and skills are vital.

Project Partners
<ul style="list-style-type: none">• Kent TEC• Kent County Council• Kent District Council Chief Executives• Kent District Council Economic Development Officers• University of Kent• North Kent Success• East Kent Initiative• Kent Economic Forum• Kent Forum for Lifetime Learning• Government Office for the South East• Department for Education and Employment

What did the project deliver?

Strategic review

In the first phase, the Programme Development Group reviewed broad functional areas, essential to Kent Prospects and Kent Learning, in order to prioritise Skills Programme activities and approach. These functions included strategy development, economic and labour market intelligence, project and service development, securing external resources, monitoring and evaluation and marketing.

Each theme was reviewed, asking:

- What new things do partners have to be able to do?
- What things do partners have to do differently, and what do they have to do better?
- What training and development needs fall from these, in terms of:
 - ◆ skills and techniques?
 - ◆ knowledge and understanding?

This exercise highlighted broad priorities, critical in relation to strategy and *common across partner organisations*. These included:

- partnership management
- project and programme management
- engaging and sustaining private sector involvement
- marketing of strategies and services
- raising the quality of project proposals

Bottom-up Dimension

The Skills Programme model was conceived as *both* top-down and bottom-up to balance the focus on strategic requirements with the needs of teams and individuals in partner organisations. It was important to involve practitioners in the development of the programme and provide tools to help teams and individuals identify and meet their needs.

The Programme introduced a standards-based Project Management Training Needs Analysis tool to a number of Kent organisations. The tool has been adapted for use in inward investment, strategy development and sector development contexts, with shorter variants introduced for needs research and in training situations.

Inward Investment

At the outset of the Skills Programme, partners were very keen to develop training in inward investment. The central need was to promote common understanding of the inward investment challenge (eg, a realistic appreciation of prospects, what's needed to secure investment for Kent), gain agreement to changes necessary in adopting a partnership team approach to promoting the county, and improve performance in capturing mobile investment projects

Two events were run, a seminar for senior executives and workshop for practitioners. Both involved participants from the public *and* private sectors.

Sector Development

The second theme to be tackled was sector development, a core theme of Kent Prospects. Kent TEC had recruited on consultancy contracts a number of sector co-ordinators, charged with developing and servicing sector groups and providing technical advice to the TEC (eg, in the development of Modern Apprenticeships). The need was to review progress and performance issues, clarify their role in relation to the broader competitiveness agenda of Kent Prospects, and develop partnership working.

Workshops were run first with co-ordinators to take stock of progress, strengths and weaknesses in current activities; and to review the role of sector co-ordinators and their perceptions of partner objectives and priorities. This was followed by a workshop with co-ordinators and representatives of key partner organisations to review their common agenda and scope for increased collaboration.

Managing Partnership Projects

A training programme was developed to address the needs of managers in partner organisations who have responsibility, either directly or indirectly, for achieving successful outcomes through partnership projects. Common issues identified included needs to clarify responsibilities and accountability, build cross-organisational teams, improve communications and improve results in partnership-based bidding and programme delivery.

The training programme took as its theme, "*how can you achieve success where you can only influence, not control?*" It focused on influencing skills, managing divergent and conflicting interests, putting partnership success factors in place, and achieving added value through collaboration.

The course material directly addresses competence requirements, eg, in:

- reviewing partnership strengths and weaknesses

- identifying stakeholder interests and influence over partnership outcomes
- gaining support for partnership aims and activities
- managing conflicts and tensions

It also provides tools for diagnosing needs in individual partnerships and for action planning to manage changes needed, appropriate to the stage in the partnership's life cycle.

Use of the Standards

The occupational standards framework has informed both the conceptual approach to the Partners Skills Programme and contributed in specific ways to its implementation, especially in:

- identifying training and development needs
- reviewing partner roles and responsibilities
- informing the design of training provided

A workshop was run to explore how standards could be used to reinforce partnership working and promote competence-based approaches to training and continuing professional development in partner organisations.

The standards have also been used, eg, in:

- drawing up specifications for training (eg, on project management; and monitoring and evaluation), for negotiation with training providers
- reviewing roles and skill needs in a restructured local authority economic development department
- identifying performance issues in town centre partnerships and the development needs of town centre managers, leading to a successful bid for an EU ADAPT programme
- evaluating training and development activities: where can participants point to enhanced abilities to do an effective job?
- staff appraisal and recruitment in individual partner organisations

“We’re now appraising the performance of our managers against a core set of standards. It’s taken time for people to become accustomed to them, but now we’re seeing how they pay off when it comes to sharpening our recruitment practices.”

“We see the standards as part of our overall approach to improving performance internally and across our areas of partnership working. All the time, we must concentrate on how we improve our impact, how we increase our success rate in bidding and how we deliver our outputs to target.”

“It seemed like introducing the use of standards would be yet another initiative like IIP or ISO 9000. But in fact it supports and complements these, and is precise to our needs.”

“You can take a bit of this and a bit of that from the framework, to make it fit your requirements.”

To what effect?

Inward Investment

The first event succeeded in winning support for proposed changes in managing inward investment in Kent, and the second focused on practical steps for improving co-ordination of partner roles. An evaluation six months later found a range of learning and performance outcomes, such as:

- enhanced appreciation of partner roles and responsibilities
- implementation of co-ordination proposals
- improved public: private sector collaboration in enquiry handling

“The event showed the willingness to work together and how best to do so.”

“All of us are now speaking the same language.”

Sector Development

Outcomes included a new job profile and contractual requirements (including specific steps to build relationships with partners), and better relationships between co-ordinators and partners in the spirit of informal sector development partnerships. There are also steps proposed to improve communications (eg, audit of critical information requirements; sharing of progress reports, bidding plans, etc). The role of the sector groups and the co-ordinators is clearer in relation to how they can influence partner activities, directly and through the Kent Economic Forum.

“It was the first opportunity we had to get together. Since then, I’ve been to other events and the networking is getting easier.”

Managing Partnership Projects

Participants found the course valuable in developing their understanding of partnership concepts, in introducing them to tools that they can apply in their own partnerships, and providing real life case studies to compare with their own experience. As a consequence of their recommendations, aspects of the course are now built into activities to meet the needs of specific partnerships, new or existing. A partnership development service is now operational, and partnership building initiatives are being promoted to develop “shared problems and shared solutions” approaches (eg, to address skill shortages).

“We were able to dispel myths and misunderstandings.”

“It helped me see other people as individuals, not just representatives of some other organisation.”

Key lessons

Partnership Development

Action to develop skills and more effective partnership working remains a priority for Kent Prospects and Kent Learning, and the Partners Skills Programme has continued beyond the period of DfEE NDA funding.

The Skills Programme now concentrates on priorities emerging from the Annual Competitiveness Review (the assessment of progress and impact of Kent Prospects and Kent Learning) and action in support of individual partnerships or key partner relationships. An example of the latter is working through the practical implications of a concordat between Kent County Council and Kent TEC which sets out partner roles and responsibilities.

- There is a continuing need to promote the Skills Programme not just as a set of training and development activities but also as a way of working. In a sense, the Programme is contributing to the development of a “*learning partnership*”, where partners recognise that there is a need to pay attention to process issues as well as partnership tasks. Successful outcomes from partnership working depend, eg, on key individuals creating the environment for effective collaboration; reviewing together how their partnership is working and how to improve it; and clarifying their own role, expectations and responsibilities.
- Many of the performance issues raised through the Skills Programme concern partnership working and partner commitment. Each of the training and development programmes run has attempted in some way to address partnership performance issues.
- Skills Programme activities have created new opportunities for networking within the county, across organisational boundaries and professional interests

Use of Standards

The standards framework has primarily been found very useful for a range of applications. As raw material, however, it has needed to be “processed”, eg, in the form of tools for training needs analysis or reviewing partner roles and responsibilities. It was found generally easier to engage people in reviewing development needs by focusing on skill and knowledge, rather than standards per se.

- A competence-based approach is unfamiliar for most potential users, and will take time to embed. There is often a need for induction into the use of the standards and time to explore what they have to offer.
- The Skills Programme made a conscious choice to build the standards into its activities, rather than promoting competence per se. Resolving partnership issues has been seen as a higher order priority.
- To take *full* advantage of the standards framework, it is desirable to have agreement within the partnership/ organisation on objectives, principles/

protocols and targets. Participants can then more readily focus on the skills and knowledge needed to achieve partnership goals.

“The most immediate relevance of the standards has been in reviewing roles & responsibilities, and analysing performance issues.”

Lessons for implementation of standards include:

- Find the most important ways in – what uses of the standards will offer early pay-offs to individuals? These will provide opportunities to explore how the standards work and what more they have to offer.
- Take care in introducing the standards: they can seem threatening and daunting and people sometimes fear that they will be applied in a bureaucratic manner.
- Promote the use of the full set of standards as a reference document, to be accessed only as necessary.

Merseyside TEC & Community/ Local Economic Development

Project features

- partnership/ organisational review, to set context for assessment and learning
- use of standards for individual assessment, identifying training and development needs
- “real work” context for partners learning together
- four partnerships/ organisations demonstrating range of issues, needs; community activists involved as well as professionals
- strong support for the development of qualifications geared to the distinctive requirements of people working in community/ local economic development
- design and delivery of a training programme on “Effective Partnership Working”
- accreditation of individual learning

What did the project set out to do?

Merseyside TEC is one of five partner organisations in a local consortium promoting the new NVQ in Community Work. A training needs analysis with paid and unpaid community workers involved in Liverpool Pathways Partnerships¹ demonstrated their desire to develop their core community work skills and their need for training and learning support relating to economic regeneration.

Project Partners
<p><i>participant organisations</i></p> <ul style="list-style-type: none">• Duke Street/ Cornwallis Partnership• Huyton Regeneration Partnership• Parks Economic Development Agency Ltd (PEDAL)• Sefton Council for Voluntary Service
<p><i>Stakeholders</i></p> <ul style="list-style-type: none">• Merseyside TEC• DfEE• Employment Links• Government Office for Merseyside• Liverpool City Council Central Policy Unit

The partners recognised that the production of the economic development standards framework provided an opportunity to meet this need as an add-on to the existing project. The process of familiarising participants and managers to the use of the standards was already underway.

¹ Pathways Partnerships operate in areas on Merseyside suffering from the most severe economic conditions. They engage local communities in partnership with business, public bodies, training providers, etc, in initiatives to promote neighbourhood regeneration and the integration of disadvantaged local people into education, employment and training opportunities. They are funded under EU Objective 1.

Objectives of the project were to:

- design and apply an assessment framework for individuals and organisations working towards the economic regeneration of their community
- develop appropriate forms of learning and training support which underpins achievement of accredited standards

It also provided an opportunity to explore how the economic development standards complement the national standards for community work.

What did the project deliver?

Over 50 people took part from partner organisations, with 10 individuals using the standards as an assessment framework and tool for identifying learning needs. They covered a range of managers, development workers and community activists².

A common process was followed in each of four organisational or partnership settings:

Process: from partnership review to individual competencies	
1.	Workshop to introduce the project and the standards
2.	Partnership organisational review <ul style="list-style-type: none">▪ participants completed a review questionnaire covering all areas of performance
3.	Action planning <ul style="list-style-type: none">▪ ways identified for addressing priorities for the particular partnership
4.	Support to achieve action plan targets <ul style="list-style-type: none">▪ support negotiated from project consultants▪ action learning workshops
5.	Review of individual competencies <ul style="list-style-type: none">▪ work on implementing action plans allowed the observation and mapping of participant roles and competencies and the collection of examples of evidence against the draft occupational standards

To what effect?

Duke Street/ Cornwallis Partnership

The partnership review stage was completed, highlighting priorities such as:

- practising collective working and decision-making where partners are “unequal”
- improving communications
- meeting the learning needs of partnership members, individually and as a group

² The Chief Officer, Health & Community Care Development Worker and Training Officer of Sefton Council for Voluntary Service; a Principal Planning Officer from Liverpool City Council; the Manager of PEDAL (Parks Economic Development Agency Ltd); an Area Development Officer (Employment Links); an Employment Broker (Duke Street/ Cornwallis Partnership); and community activists with the Huyton Regeneration and Duke Street/ Cornwallis Partnerships.

A learning programme on “Effective Partnership Working” was developed in discussion with participants. It was intended to provide useful underpinning knowledge for several vocational awards.

Effective Partnership Working: Programme Content	
<i>Competence area</i>	<i>Skills & knowledge addressed included:</i>
Personal effectiveness	<ul style="list-style-type: none"> • facilitating groups with broad ranging backgrounds • meeting skills • assertiveness • time management
Managing the partnership	<ul style="list-style-type: none"> • developing a shared vision • effective structures and decision-making • action planning
Managing people	<ul style="list-style-type: none"> • recruitment & selection • supervision & appraisal • team building • managing conflict
Managing finance	<ul style="list-style-type: none"> • budgeting & control • influencing financial decisions • outputs and monitoring
Managing information	<ul style="list-style-type: none"> • interpretation, management and presentation of information • induction system
Learning	<ul style="list-style-type: none"> • good practice case studies

“We thought that it would be easier to address some of the issues within a learning environment first, and then to transfer the learning into practice in the partnership”

A project consultant tutored the programme, with participants delivering some inputs. There were 10 regular participants, who kept a portfolio of evidence of their collective and individual learning, including an individual learning diary. If they wished they could submit this evidence for accreditation, to gain an Open College Network (OCN) certificate.

The approach was found by participants to be “a breath of fresh air”, with benefits including “a developed understanding of key issues in partnership working”.

*“Before the project, the community representatives didn’t **know** that they were involved in economic development! They were surprised that they could contribute something to the wider scene. It furnished them with **participating skills**.”*

“We got much more out of this because we brought together people together from different areas.”

“My own personal development has been tremendous.”

Huyton Regeneration Partnership

The Huyton Regeneration Partnership has extensive involvement of local people. At the outset of the project, some as members of recently formed, community-based working groups were becoming involved in appraising and promoting projects within the Huyton

HELP (Huyton Encourages Local People) SRB programme. Given how new they were to this process, there were understandable uncertainties about their role and how the partnership works.

An initial session introduced both the community work and economic development standards. Partnership members showed more interest in the former standards, which were seen as more directly relevant to their concerns. One issue that emerged was what was called the *partnership merry-go-round*, where people who join the partnership process find they cannot communicate with those are not taking part.

The partners also completed a review of the partnership, and by the end of a second workshop, were able to conclude that the process had been valuable in:

- ◆ reviewing first year of Huyton HELP
- ◆ assessing the skill and knowledge levels of the staff and board members.

One output was the agreement of an action plan for the Partnership Board for the next year.

“This was a good case study for the problems of partnership working and how full-time staff can support that process by working across the professional boundaries of public and private sector and the local neighbourhood committees”

“A core of residents stayed with the process and found it very useful. It broadened their horizons and enabled them to place themselves in a wider scene.”

“It is a very good way forward, to give people the knowledge. This leads to empowerment. Those who took part are more confident and more motivated.”

Parks Economic Development Agency Ltd (PEDAL)

The standards project was involved in developing a new initiative, through a series of two-hour workshops that explored project possibilities that PEDAL could take forward and bid for resources to implement. The main objective was to promote jobs for local people.

The assessment of ideas led to a proposal to the Employment Service under the New Deal for Young People to establish an Intermediate Labour Market (ILM) project for a community research/ consultancy resource. Participants proceeded to work on:

- devising how such an ILM initiative could be organised and managed, including arrangements for supervision of trainees
- identifying opportunities for “real” work in community research/ consultancy
- exploring accredited learning support that could be provided, and progression routes for participants
- drafting job descriptions and a recruitment process

In addition, an organisational review of PEDAL was completed, involving four weekly sessions with the board, facilitated by the project consultant. An action plan was agreed

to address three key issues: marketing and publicity, clarifying aims and objectives, and the development of a learning programme for board members

“It was just the right time for the exercise, when the project was in start-up mode.”

“It was a good route for personal development. I learnt a quite a lot, such as on strategic management, SWOT review and organisational set-up.”

“The standards helped highlight where our strengths and weaknesses were.”

Sefton Council for Voluntary Service

As in the other case studies, Sefton CVS (SCVS) completed an organisational review, agreeing an action plan concentrating on developing a monitoring and evaluation scheme which would measure “quality in process working”. The organisation was already used to output monitoring in the SRB context.

A new monitoring and evaluation scheme was developed through a series of workshops. The work concentrated initially on health and community care (activities jointly funded by Sefton MBC Social Services and Sefton Health), in anticipation of a formal review of SCVS’s performance. The design of the scheme was concerned to reflect what users of the service saw as priorities in terms of the type of support on offer, how the service was delivered, and what might be key service areas for the future. The process then developed and tested a set of performance measures through a series of discussion groups and a survey of 300 user organisations. In addition, projects in Northern Ireland and Wales were visited, to learn from their prior experience of monitoring and evaluation schemes.

One important outcome was that model was accepted by Sefton Social Services as the basis for the review of the SCVS service.

Learning gains included clearer understanding of:

- the roles of SCVS staff in supporting the community/ voluntary sector in community/ local economic development
- learning and support requirements for monitoring and evaluation

Using the standards

The full range of project participants supported the need for a process which would accredit their competence in relation to their contribution to community/ local economic development.

“The participants found the model helpful because of the way it illustrates the range of different roles and responsibilities and also because it describes the importance of relationships between people with different roles”

“The participants felt that the draft standards were a useful tool to measure their role and competence”

Participants from the four organisations shared experiences during a workshop part-way through the project, and reviewed their learning needs. This highlighted a range of requirements, relevant to the content of the economic development standards framework. The needs included identifying client needs, researching projects, monitoring and evaluation, marketing, managing contractual and power relationships, equal opportunities and ensuring partner commitment.

Key lessons

- Participants stressed how much they had benefited, in confidence and knowledge, from learning together and from each other's experience. There was typically a need, however, for greater priority to ensuring that all members within partnerships were able to learn and develop skills together.

*“The process adopted has been effective in generating sufficient findings and evidence to assist us in meeting the objectives set. By starting with an organisational or partnership review, the project enabled participants to develop an insight into the organisational and partnership requirements for effective working. This starting point allowed participants to identify **real work** opportunities around which they could develop action with the support of the project. Working on the action plans has helped individuals identify their own skills and knowledge and to be aware of need in this area.”*

- The standards were found useful, though there was a concern that the “further a person is from a strategic role and from the public sector, the less s/he is reflected in the draft standards”. This is an issue for future development of standards in this field. It was noted that many people contributing to community/ local economic development do so as part of a wider paid or unpaid job or role description.
- Training and standards for people involved in community economic development need to recognise the diverse range of demands on participants:

“Many of the people involved are operating at a local, operational or project level. They are frequently asked to be involved at a strategic level of thinking without being given any background or preparation”

- Concerns were also expressed that the language used in the standards was sometimes inaccessible and, at times, inappropriate to their particular requirements
- Other broader issues raised by the project relate to the demands placed on people working in local communities:

“We need to address the situation where, because of insufficient development time, and the absence of involvement at an early stage of all the subsequent partners, plans frequently lack adequate ownership and understanding by all the stakeholders in a partnership”

“Given that partners have unequal access in terms of power, information, knowledge and confidence, partnership co-ordinators and managers have to acknowledge the difficulty they face in facilitating meetings and decision-making”

“There's more that funding bodies can do to ensure that people developing and managing partnerships should receive appropriate support, encouragement and training to ensure effective performance”

*“Adequate resources and priority should be allocated to identify and meet the learning needs of **all** partnership members. We need, too, to ensure that people leading partnerships give appropriate priority in commitment, job descriptions and work allocation to enable people working at a senior level to participate in learning and development activities alongside other partners.”*

- For the partners, the project “gave us greater insight into the skills needed to develop effective community economic development”

“It’s now seen locally as a model of best practice.”

“The approach to the project has helped to develop the partnerships, make sure all partners work on an equal footing and develop individuals as well, with accreditation offered as a personal return.”

“Everyone needs to have the same information and education.”

Somerset Economic Partnership

Project features

- review of a strategic economic partnership, to:
 - ◆ ascertain partner views on partnership strengths and weaknesses, achievements and benefits and future vision/ direction
 - ◆ agree an action plan for the future development of the partnership
- standards used in reviewing partnership roles and responsibilities, identifying training and development needs of core partnership team
- the structured approach helped to consolidate the partnership and led to successful outcomes

What did the project set out to do?

The Somerset Economic Partnership (SEP) was formed in 1994, at the instigation of Somerset TEC and Somerset County Council, to act as the strategic economic development partnership for the county. It was intended to support the partner organisations (public bodies, employer and union representatives, further education), in lobbying, co-ordinating funding bids, taking forward specific projects and promoting the area as a business location. By mid-1996, there was a need to take stock, review achievements and direction and plan how the partnership would make more of a difference.

The review was carried out through interviews with *all* partners and workshops for partner representatives and staff. The interviews sought to identify the level of partner commitment and diagnose the nature of obstacles to effective partnership working, seeking partner views on action needed for improvement.

Project Partners

- Business Link Somerset
- CBI South West
- Employment Service
- Government Office for the South West
- Mendip District Council
- MEP
- North Somerset District Council
- Rural Development Commission
- Sedgemoor District Council
- Somerset Chamber of Commerce and Industry
- Somerset County Council
- Somerset TEC
- South Somerset District Council
- Taunton Deane Borough Council
- UNISON
- West of England Development Agency
- West Somerset District Council
- Yeovil College (on behalf of all tertiary colleges in Somerset)

The economic development standards framework provided a resource for the project in a number of ways:

- considering the requirements of partnership management, and the approach to the partnership review
- reviewing partner responsibilities within SEP
- reviewing training and development needs for SEP staff

What did the project deliver?

The interviews found that SEP, as things stood, was central and important to only a small number of the partners. But despite some disappointed expectations, there was widespread belief that county-level partnership was needed, and that real progress had been demonstrated since appointment of an SEP Manager a few months previously.

Factors influencing the situation were:

- lack of a strong common purpose and coherent strategy
- associated weakness in partnership ownership and commitment
- partnership members behaving as an assembly rather than as a team
- limited accountability and active involvement on the part of some partners
- inappropriate structure and ways of working

It was important for many interviewees to be asked, by an independent third party, what they wanted the Partnership to achieve, and what they wanted for their own organisation.

Two workshops were subsequently held, one for SEP members, and one for partner staff. These were forward-looking: how can we collaborate more effectively? Messages coming from the interviews and the initial workshop included:

- concentrate on a limited number of priorities
- define clearer objectives, responsibilities, milestones, success measures
- promote more project group working and encourage wider involvement
- change the structure of SEP, moving to a forum which meets less often and establishing an executive

Partners also recognised that progress would be dependent, eg, on:

- putting in place a dedicated partnership resource
- achieving early tangible successes, with rewards shared amongst partners
- greater willingness to do things differently and work in ways which will build trust

There was a keener focus on partnership added value, eg:

- championing Somerset interests on strategic economic development issues
- promoting the “Somerset” brand to the outside world
- providing a framework for guiding partner activities (including bidding)

- co-ordinating critical county-wide functions (eg, handling inward investment enquiries)

The second workshop, involving managers from partner organisations, concentrated on actions needed to progress two strategic themes, developing sectoral initiatives (with food and drink as the example) and co-ordinating bidding.

A Partnership Responsibilities Tool, based on the economic development standards, was used to help the core team and partners consider:

- What strategic roles and functions must be carried out by/ within the partnership?
- Who is responsible for what?
- Where are the gaps?
- What to we need to improve?
- What are we going to do, and who is going to do it?

Essentially, the Partnership Responsibilities Tool covers a “plan, do, review” cycle of roles and functions needed by strategic partnerships. The diagram below sets out the main requirements of this.

Strategic Responsibilities in Partnership	
Functions	Requirements
A. Assess strengths, weaknesses, opportunities, threats	<ul style="list-style-type: none"> • assess: <ul style="list-style-type: none"> * needs & opportunities * local scope to address * internal capabilities - and the competition
B. Develop and communicate mission & objectives	<ul style="list-style-type: none"> • build support • devise objectives, plans
C. Develop and implement projects & programmes	<ul style="list-style-type: none"> • identify necessary changes • provide authority, briefing, support • review/ develop capabilities within & beyond the partnership • ensure systems & structures for implementation
D. Review and evaluate	<ul style="list-style-type: none"> • define criteria for monitoring progress & measuring success • assess achievement • identify success factors • act on findings

With greater clarity on SEP purpose and objectives, staff in the SEP core team were able to begin to consider their own training and development needs, in relation to their immediate work programme and beyond. They used the a standards-based training needs analysis tool which sets out the standards relevant to project development and management roles, and summarises underpinning skills and knowledge in relation to these.

Project Management TNA Tool - Job Roles Covered
<ul style="list-style-type: none">• developing projects and services• partnership and consultation• securing and managing resources• promoting projects to target audiences• managing suppliers• monitoring and evaluation• managing project teams

The Project Management tool can be used on different levels:

- first, as a checklist for determining what is most important in the job, and where development needs are most pressing
- secondly, as a means for in-depth consideration of development needs. Having identified performance and learning priorities, users can take advantage of the detailed good practice specifications contained in individual occupational standards to help clarify specific learning needs and set a target for improved performance

To what effect?

The review of SEP resulted in renewed commitment amongst partners. The County Council seconded two members of staff to create, with the SEP Manager, a core team, and other partners have agreed to specific tasks and contributions.

Partners are clearer about what they expect of SEP, and more realistic than at its launch about what is possible given limited resources. There is greater recognition of the responsibility that partner organisations themselves have for SEP success, and of the need to ensure that others within their organisations are better informed about SEP activities and the benefits the Partnership brings. Partners more often use “we” when discussing SEP matters, where once it was “they”, seeing SEP as an offshoot of the TEC or County Council.

The exercise in reviewing partner roles highlighted the requirement for continuing responsibilities on the part of individual partners. The creation of the SEP core team does not diminish what the partners need to do in pursuit of SEP goals, rather it strengthens the requirement (eg, for setting clear objectives, implementation support, improving communications within and between partner organisations, etc).

Scope for improvement was identified in most strategic partnership functions, notably in improving systems for identifying and circulating details of funding opportunities, collaborating in bidding and project development, lobbying and influencing. Individual partners gained a clearer understanding of the roles they need to play in support of the partnership, including publicising SEP and generating support within their own organisations.

For the SEP core team, the use of the training needs analysis tool brought out needs concerning managing relationships with partner organisations, ensuring that messages about SEP reach the right audiences, performance indicators and evaluation, and the preparation of bids and business plans. This analysis is guiding future development plans, and influencing the allocation of tasks within the team, in order to maximise learning opportunities. The SEP Manager intends to use the Project Management tool in working with partners developing new projects, reviewing strengths within the partnership and developing capabilities through joint working and work-based learning.

Key lessons

Partnership Development

- the project demonstrated the value of taking stock of partnership progress and operations, using an approach and tools which feature:
 - ◆ full involvement of the partners
 - ◆ asking questions which get to the heart of partner commitment
 - ◆ depersonalisation of issues
 - ◆ neutral ground/ facilitation by a third party
 - ◆ action planning

“The process really helped. It was non-confrontational: we need that.”

“It has a value as a process check. For instance, what have we each done to communicate what the partnership is about and to involve others in our organisation?”

“We could have avoided lots of partnership problems if we’d done this earlier”

Use of the Standards

- the standards were found to provide a relevant framework for reviewing partner roles & responsibilities and for assessing learning needs

“It’s just the thing for us to use in setting up our new team. There’s plenty of scope for new roles and tasks, and widening people’s experience.”

“What do we as individuals bring to the job at hand? What are our strengths and weaknesses? What do we have to work on together as a matter of priority?”

“What this process has helped us do is think creatively about how best to meet our training needs. Coaching job assignments, joint project work – these sorts of things.”

- To get the most out of individual standards it helps to have the support of someone already familiar with how the standards work and what they contain
- The project demonstrated the importance of dealing with the bigger, fundamental issues first - ensuring that there are clear and agreed objectives, with senior-level commitment, to guide partner activities. Only then can partner staff

readily engage together with the standards-based materials in addressing partnership priorities.

- Any further development of the standards should ensure that the need for skill and techniques in partnership leadership and management are fully covered:
 - ◆ developing a partnership vision and principles which have meaning for what individual partners do
 - ◆ defining partnership added value, and focusing on its achievement
 - ◆ sharing leadership
 - ◆ allocating/ generating adequate resources
 - ◆ demonstrating benefits to all partners
 - ◆ seeking win/ win solutions in negotiations involving partners

West Yorkshire TECs

Project features

- thorough review of the occupational standards framework by four TECs
- first stage to assess their relevance to the work of TECs
- second stage to test them as tools for reviewing job requirements and identifying training and development needs
- subsequent use of the standards by individual TECs, eg, in devising job descriptions
- strong support for the development of standards-based qualifications and for the use of the standards with partners

What did the project set out to do?

Four contrasting TECs in West Yorkshire conducted a two-stage project: first, to test the standards framework as a tool for the assessment of individual TEC functions and strategy; and second, to review the standards as a tool for appraisal and training needs assessment of TEC staff.

Project Partners
<ul style="list-style-type: none">• Barnsley & Doncaster TEC• Bradford & District TEC• Leeds TEC• Wakefield TEC

What did the project deliver?

Phase 1 of the project employed a questionnaire to TEC staff in economic development roles, focusing on:

- the usefulness of the standards
- how well the standards equated with TEC views of local economic development and to TEC functions
- organisational activities for which the standards could be used

Phase 2 involved a cross-section of TEC staff, drawn from different areas of TEC activity. They were asked to identify the areas of the standards most relevant to their own work, and to rate their own competence against these. They were also asked to consider how the standards relate to their existing performance appraisal system.

Workshops were held at the end of each stage, involving staff from all four TECs.

To what effect?

As participants explored the standards in Phase 1, a general view emerged of their relevance to the work of TECs and their partners, especially in the strategic and project development functions. The section in the standards concerning the delivery of services (especially business support services) was not found so relevant.

“This is just like a job description for the TEC.”

“It’s clear how we complement the roles of other partners as just one player in the economic development field. They address issues across the partnership.”

“There is an identifiable person within the TEC charged with every part of the functional areas identified within the standards - although probably not with having to perform each and every function!”

The TECs involved a range of staff in the project, not just staff with “economic development” or “economic regeneration” in their titles. Staff in other roles (eg, operations, marketing, research) could see the relevance of the standards framework from their point of view.

Participants were surprised that, given some initial adverse reactions to the standards, by the second stage there was considerable depth of support for the standards and how they could be used.

*“The standards can be linked to training for **all** levels of staff.”*

“For an individual, it’s easy to identify with the competences. People would say, ‘Oh, that applies to me. And that other competence should”

“The standards help you think about how you can develop your skills and knowledge in all sorts of ways, not just by going on courses.”

Participants were invited to identify where they might use the standards:

Potential Uses of the Standards
<ul style="list-style-type: none">• organisational review• team building• defining jobs and drafting job descriptions• identifying training needs• staff appraisal• recruitment, selection and induction• negotiating external training• devising in-house training• benchmarking• setting standards for/ evaluating sub-contracted provision• resolving partnership management issues• developing policy/ strategy• working with partners

Of these, participants expected the most pertinent to be:

- defining jobs
- training needs analysis
- developing policy and strategy

“We see the standards as being all about continuous development. They’re something to work towards.”

“I’d like to see opportunities for individuals to work at partner organisations where they need to develop a specific competence that their own organisation cannot or not quickly give them.

“We could be using the standards for mapping career paths, for pay and remuneration.”

Individual TECs went on to use the standards in several ways, eg:

Bradford

Bradford TEC benchmarked their strategic activities and confirmed the nature of gaps in roles and skills they thought existed. They used the standards in drawing up the specification for a Policy Adviser post. The process helped clarify the requirement and ensure that the post was graded at the right level. They have also used the standards in designing a joint economic intelligence unit established with the local authority and agreeing job descriptions for the posts involved.

Wakefield

After the standards project was completed, Wakefield TEC went on to draw on this experience and that of the Somerset Economic Partnership review. With their partners in the Wakefield Economic Alliance they reviewed their strategic objectives, and mapped roles, tasks and skills.

“The approach has brought objectivity to the process of reviewing what we need to do in the partnership and who should be doing what. It has taken the sting out of some of the issues.”

“Within the partnership, we’ve reviewed what we need to do and our total skills. Who brings what capabilities, and where are the gaps?”

Key lessons

- The project was successful in opening up the possibilities that standards offer, in a situation where people had come across standards in NVQs but not in other applications
- Participants concluded that the standards are helpful at both organisational and individual levels in identifying strengths and development needs, starting with a process of mapping competence across the TEC

“They are useful as a road map or framework for those new to economic development as a job description”

“The standards have been very helpful in devising job descriptions. We’ve gained a clearer idea of what we really need, and we’ve ensured that we’ve graded the jobs properly.”

“Working through the standards has been a great help in clarifying roles across the organisation. It helps to see how we fit into the whole and where we need to work better together.”

“They provide a valuable framework for identifying training needs. But they do need good review systems in place, and they can be difficult to work with.”

“The standards framework is like a job description for our economic development partnership. It has helped us clarify our strategic objectives and agree what we need to do.”

- Participants stressed the need to plan implementation of the standards – not least where partners were to be involved.

“Use with partners and by partnerships is key to comprehensive use of the standards.”

“The project would have been more powerful for us if we’d engaged our main partners from the start and worked through the exercise together.”

- Concerns were expressed about aspects of the lay-out, language and content of the standards which deter their ready use. Some of these related to the use of jargon (including the term, “competence” itself). Forms of presentation to facilitate use are needed.
- The universal application of the standards across all individuals and groups of staff would be a significant commitment

“It would require a considerable investment of time to promote the standards and adapt and develop existing systems for staff appraisal, TNA, etc”

- Participants strongly recommended that the standards should be developed further as National Vocational Qualifications

“It is a fantastic opportunity to link in with NVQs. As a TEC, we are committed to training so it will be a lost opportunity if the standards are not developed as national qualifications.”

“The inclusion of European Officer competence would help incorporate all partners.”

“We need now to take the standards and work through them with our partners. Having a nationally accredited set of standards would be the trigger for this.”

Using Occupational Standards

POTENTIAL BENEFITS FOR ECONOMIC DEVELOPMENT ORGANISATIONS

- improved organisational and staff effectiveness
 - ◆ greater impact
 - ◆ satisfied customers
 - ◆ performance against targets

by offering

- means to work through organisational objectives to job requirements
- competence framework for the whole organisation
- training designed to meet “real work” requirements
- means to:
 - ◆ identify potential improvements and diagnose performance problems
 - ◆ ensure more effective recruitment and appraisal
 - ◆ reinforce a desired culture, oriented to results and learning

POTENTIAL BENEFITS FOR ECONOMIC DEVELOPMENT PARTNERSHIPS

- improved partnership effectiveness
 - ◆ greater impact
 - ◆ more cohesiveness and ownership

by offering

- a common language
- means to
 - ◆ clarify partner roles and responsibilities
 - ◆ review partnership strengths, weaknesses and the contributions of individual partners
 - ◆ create opportunities for partners learning together
- tool to help
 - ◆ new partnerships determine what they need to do
 - ◆ existing partnerships agree what needs to be improved

POTENTIAL BENEFITS FOR INDIVIDUALS

- increased ability to do a demanding job
- greater satisfaction
- increased motivation

by offering

- framework for developing skills and knowledge

- defined professional standards and good practice
- accreditation of learning and job competence
- clarified requirements/ expectations of individual and team performance
- more objective basis for appraisal
- flexible routes to learning and achieving qualifications
- increased awareness of how one fits into the organisation (and its partnerships) as a whole