



European Union
European Structural
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Individual Participant Personal Assessment Tool (PAT) Version 2: 1 October 2018

The PAT is to be completed by all individual participants supported by ESF projects funded under Objective 1 and Actions 1.1 and 1.2 and ERDF projects funded under Objective 2 and Action 2.1.

The purpose of the PAT is to:

- help projects to understand their participants circumstances and the type of support their participants require; and
- benchmark and show the difference each project has made on each participant in terms of their personal progress across a range of themes, including:
 - Self-confidence;
 - Money;
 - Training, employment and enterprise;
 - Health & wellbeing;
 - Aspirations; and
 - Making a difference.

Each of these themes relate to the aims and objectives of the CLLD programme overall.

To be able to demonstrate change it is essential that projects complete a PAT with each participant as part of their initial enrolment and assessment for the project and as part of their exiting from the project. **This means that each participant must have at least two complete PATs (from enrolment and exit) over the course of their involvement with the project** as without these it will be impossible to demonstrate the difference each project has had on each participant.

For those projects working with participants over an extensive period of time (6 months or longer) it is expected that a number of PATs will be undertaken with participants as part of the ongoing review and assessment process. For example, if a project works with participants for 6 months it would be expected that each participant would complete at least 3 separate PATs over this period, at the following stages:

- Benchmark PAT completed as part of initial enrolment and assessment;
- A midway PAT undertaken after 3 months/at the half way stage of the project; and
- A final PAT undertaken as part of the participant exit/sign-off process.

Alternatively if a projects intends to work with participants for 12 months then they will be required to complete quarterly PATs with these participants. Each funded project **must** use the same PAT with each participant to ensure the consistency and comparability required to make a robust assessment of the programme. All PATs must be completed with the participant and recorded electronically on the spreadsheet provided by Sunderland City Council.



Project name

Participant name

Date Completed

By Participant

By Advisor

Jointly by Participant & Advisor



How to use the chart to map your journey

Each of the 6 areas on the chart has a scale from 1 to 5 (with 1 being the lowest) to help you decide where you are now on your journey. To ensure that you get the best support right from the start of your journey, you need to be completely honest with yourself when scoring, and talk each section through with your advisor.

Step 1 – Not Engaging/Acknowledging: Not wanting to engage with the issues that act as barriers to reaching my goals

Step 2 – Resistance: Aware of issues, but do not know how to address these.

Step 3 – Acceptance: Aware of issues, and willing to accept support to address them.

Step 4 – Working Together: Ready and willing to set achievable goals and work towards them step by step with practical support.

Step 5 – Self Sufficient: Able and happy to move forward on my own, and know where to access support if I need it.



Self Confidence

This is about how you relate to people in general, how this impacts on your self-confidence and how you view yourself. The higher the score, the more confident you are with yourself and around other people.

5. I have a positive outlook on life and know I have a lot to offer. My self-confidence is not an issue. I am a resourceful person who is calm and level headed. I have good problem solving skills, and feel comfortable communicating with people at all levels.

4. I feel ready to make progress and develop my confidence, and make progress in the right direction. With support, I'm willing to explore options that can help me develop my confidence, recognise my strengths, and work on my self-esteem by setting achievable goals.

3. I know that I need to work on my confidence and self-esteem in order for me to move forward with my life. I would definitely like support to do this and will consider setting small achievable goals.

2. I really don't know who to turn to ask for support. I can't possibly improve my confidence or work on my self-esteem when I have more important things to worry about. I'd love to have more confidence but I can't see it happening.

1. It's really difficult for me to talk about this at the moment, I don't even want to think about the future.

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Money

This is about your financial situation, such as how you manage your money, or if there have been any recent changes to your income/expenditure. How does your financial situation impact on your day to day living?

5. I manage my financial situation well, and have no problems budgeting my money effectively. I am able manage my money to be able to meet my needs daily, or to pay any unexpected bills. I don't face any problems in this area, but if I did, I know where to seek support.

4. I am financially stable, but can see some long term problems to my current situation. I would possibly struggle to pay any unexpected bills, but I can clearly see a way forward to resolve this, by speaking to professionals.

3. I am already looking at my financial situation with support, but I find it very difficult to remain focused or to accept some of the suggestions that have been offered by professionals. However I do believe there is a way forward, and I am now willing to make some tough decisions about my finances.

2. My financial situation really worries me. I am worried that looking into this would be negative and leave me worse off, so I am unsure how to move forward.

1. I am in a mess financially, I really don't want to talk about this as it makes me feel really upset and frustrated.

Notes:



Training, Employment and enterprise

This is about your education, skills, experience and understanding, and whether you feel ready to move into training, volunteering, a work placement, employment opportunities or enterprise either short term or long term.

- 5.** I have job specific experience/skills and/or a strong understanding of enterprise and know what to do to develop these further. I am committed to learning that will help me advance in my life goals. I am confident in my ability to seek assistance in the future.
- 4.** I am moving forward with education/training, employment or enterprise and have clear achievable goals with support. I am getting interviews and making the best use of my time to further develop my transferable skills. I feel positive about moving forward and know that support is there when I need it.
- 3.** I do have work related skills to enable me to secure a voluntary position with support or have a limited understanding of enterprise and self-employment. I would like some additional support to complete application forms and identify employment/voluntary/education/training or self-employment/enterprise opportunities that fit with my goals. I can start to see a way forward.
- 2.** I don't think I have any specific skills to offer.
- 1.** I have never worked/or not for a long time and have no understanding about enterprise or self-employment. I don't have a CV. I don't know what to do or who to speak to about seeking education/training or employment or self-employment. I don't know where to start looking for opportunities or how to move forward, I feel isolated because of this.

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Health & Wellbeing

This is about your health and wellbeing, covering everything from your Mental /Physical and Emotional health and how it can impact on the day to day life.

- 5.** I have good general health and wellbeing and know who and where to access support should I ever need it. I feel positive about this aspect of my life.
- 4.** I am actively accessing practical support that is having a positive impact on my health and general wellbeing. I am in a positive place with my health and general wellbeing but would still like support if I face a setback.
- 3.** I am willing to consider setting small achievable steps and goals with practical support to help increase my health and general wellbeing. I am willing to look at what I can do rather than what I can't.
- 2.** I have a number of health/mental or emotional issues that I am not gaining support for because I don't see them as an issues, I get by but could do better.
- 1.** I have too many health issues to think about. I don't want to talk about them

Notes:



Aspirations

This is about your hope and dreams. Do you know what you want to achieve over the next few years? Do you have the belief that you can achieve your goals? Do you have the commitment to make them happen?

- 5.** I am a motivated and confident individual who can do well without support. My aspirations are ambitious but realistic. I have a positive future mapped out ahead of me and know how to achieve my goals. I know how to ask for support should I need it.
- 4.** I know where I want to be, I am doing well moving forward achieving the goals I have set for myself but I would still like support to keep me motivated
- 3.** I have developed some clear ideas about my future, I feel hopeful and motivated working toward achievable goals knowing that I have practical support. I am doing things that are helping me move in the right direction.
- 2.** I accept that where I am can change for the better but I am unsure how to get started
- 1.** I don't think I am in a very positive place and I don't know how to change things nor am I motivated to change because it seems like a lot of hard work. Good things don't happen to people like me.

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Making a difference

This is about how you feel about and contribute to your community. Do you play an active role in your community? Do you volunteer or support local organisations? Do you support other people to contribute to their community?

- 5.** I play an active role in my community and help others to do the same. I volunteer regularly and play a leadership role within local organisations and the wider community.
- 4.** I am actively volunteering and this is having a positive impact but I still require support to allow me to increase my activity and ability to lead and help others make a difference.
- 3.** I am willing to make a difference in my community and have started to look into volunteering but I need support to help me identify appropriate opportunities and know what and how I can contribute.
- 2.** I feel as though I could make a contribution but would not know where to start.
- 1.** I don't have the confidence to make a difference in my community or support local organisations. I do not have anything to contribute.

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