JOINED UP FOR JOBS
Edinburgh's Jobs Strategy

CEC CONTRACT AND GRANT MANAGEMENT GUIDE 2026-27

Introduction

Capital City Partnership (CCP) manages funds on behalf of City of Edinburgh Council relating to employability, skills and tackling poverty in Edinburgh. Services are delivered by a variety of Third-Sector organisations through contracts and grants. This guide is intended to be used by all recipients of a contract or grant from CCP and will cover the following areas:

1. Reporting and Invoicing
2. Audit and Compliance Monitoring
3. Performance and Compliance Escalation Process
4. Outcomes and Progressions Definitions and Evidence
5. Communication and Branding

CCP aims to be as open, transparent and approachable as possible, viewing the relationship with funded organisations as a partnership. As such, it is important that any issues which arise during this relationship are discussed as soon as possible so they can be rectified. The guide can be a first port of call for organisations who have questions relating to their delivery but always approach your contract manager if there are any issues you would like to discuss.

1. Quarterly reporting and financial claims guidance

a. Submission of reports and invoices

Your quarterly progress report and latest invoice should be submitted to CCP (contracts@capitalcitypartnership.org) within 10 working days of the end of each quarter. Please send both documents in the same email.

Normally for grant holders, Capital City Partnership pays grants quarterly in advance in four equal instalments. The first instalment can be claimed once the Funding Agreement has been signed by CEC and your own organisation. The remaining grant instalments will be paid within 28 working days of receipt of a satisfactory progress report at the end of each quarter. Please note that late or incorrect submission of reports will result in a delay in payment.

For contracted providers, fees are paid monthly in advance, while outcome claims are paid monthly upon agreement of an outcome claim.

Report and invoice deadlines will be sent to all project managers via email and diary reminders at the start of the year and will be asked to cascade to all relevant staff. Dates for 2026-27 are as follows:

- Q1 Report – Friday 10th July 2026
- Q2 Report – Friday 9th October 2026
- Q3 Report – Friday 15th January 2027
- Q4 Report – Friday 9th April 2027

This final report will be your summative report for the whole year and should include reflections on the whole year of delivery including case studies.

Progress reports and invoices should be submitted electronically by the deadlines given above. Your contract manager will check the information and will contact you if there are any issues to be resolved prior to payment.

b. Completing the quarterly narrative report

Your contract manager will issue you with an individual quarterly reporting template towards the end of the first quarter, including all targets for your associated project. It is important you complete the most recent template issued by your contract manager, as this will contain all relevant information required by the funder(s).

The narrative report is used to update your Contract Manager and allow them to report progress to the CCP board and CEC Business Growth and Inclusion, as well as any other funders or partners. Please use this report to highlight any successes, issues and challenges that you'd like these audiences to be aware of.

The 'Progress on Targets' section (section 1) of the narrative report should indicate to what extent you are achieving the targets set out in your funding agreement. For grant holders, please complete the targets table with your year-to-date figures as recorded on Helix. For contract holders submitting monthly outcome claims, please include the outcome figures agreed in the claims up to the end of the current quarter. Engagement figures should be taken from Helix.

The 'Progress on Targets' table is broken down into three sections: clients; outcomes; and outputs. Within Helix, the web report template "Programme Outcomes Export" pulls the data for these three sections for you, based on the information you have input to the system over the chosen period. To view this report:

- Go to the “Web Reports” section of Helix.
- Use the “Programme Outcomes Export” report template.
- Select the dates you are interested in (e.g. 01/04/25 – end of the chosen quarter if you are a NEST provider, or 01/04/26 – end of chosen quarter for any other funding streams).
- Select the programme(s) you wish to see.
- Run the report and it will provide you with all the information you require for your quarterly reports.

For more information on what outcomes and outputs are eligible for your project, please consult your funding agreement. Detailed information on outcome types and the associated evidence required are listed in the ‘Outcomes and Progressions Definitions’ section of this document (section 4). Your contract manager will check that the reported targets achievement matches figures captured in the Helix system. If they do not match (and you have not given a reason for this) your report will be returned for resubmission and your quarterly payment may be delayed.

If there is a discrepancy between what the report is showing and what you think has been achieved, you may find it useful to check the Programme Outcomes Export Raw Data report, which shows progressions and outcomes whether verified or not. If you believe that you have outcomes which aren’t showing in the Helix report, you can explain the reasons for this in your progress report.

Please note that you can only claim for your organisation’s own work. So, if you refer a client to another provider e.g., for an employability or skills course, that provider should claim for that specific progression. When the client returns to your programme, you can claim for any pipeline progression and for any subsequent outcomes.

Locally funded employability services should not duplicate or displace other provision such as national programmes funded by DWP.

c. Invoicing

To claim for quarterly/monthly installments, please send an invoice along with your quarterly report to your contract manager. The invoice should include: your organisation’s name; the project/funding stream you are looking to claim for; the quarter/month which you are claiming the funding for; and the project reference number listed in your funding agreement. Invoices submitted without this information will be sent back and could result in delayed payment. CCP aim to pay invoices within 28 days of submission, when accompanied by a satisfactory report.

Checklist

- Reported figures match Helix.
- Targets match funding agreement.
- Evidence is held (as per Outcomes and Progressions Definitions section) for each outcome/output reported.
- Progressions are itemised (type and number achieved).
- Invoices contain all relevant information as stated above.

2. Audit and Compliance Monitoring

As part of Capital City Partnership's responsibilities for contract and grant management on behalf of City of Edinburgh Council, audit and monitoring visits for all funded providers will be carried out. This includes all contracted provision and grant holders. Given the number of organisations who hold contracts and grants across multiple funding streams and funders, we are aiming to combine these audits into one visit covering all funded projects.

The purpose of these visits is to ensure that providers of employability services deliver their projects in accordance with the terms of their funding agreements and/or contracts. The audit team will compare records in Helix with evidence held in client files and ensure that appropriate evidence is held for any outcomes claimed.

As well as auditing providers' activity through Helix, the visit will also look at the provision in-line with the Joined Up for Jobs Charter ensuring customers across all providers receive a good quality of service. The Charter is built on six key principles:

- Accessibility
- Customer focus
- Maintaining Partnerships
- Employer Engagement
- Privacy
- Fair Work

Visits will take place at providers' premises and will follow a five-stage process as follows:

Stage 1 – Audit Client Sample Preparation

The audit team from CCP will be responsible for preparing a client sample in advance of the visit. The number of client records sampled will be proportionate to the number of engagements/ outcomes stipulated in the provider's grant agreement/contract and the volumes visible on Helix. The sample will be selected from the current financial year activity as reported on Helix. Once completed, the client samples will be encrypted with passwords unique to each individual provider/project, which will be sent to you separately.

Stage 2 – Scheduling Visit

Providers will be given at least two weeks' notice of the visit, allowing time to prepare the client sample files for inspection. Providers must confirm via email that they are happy with the date/time suggested, as well as confirming that all selected files will be available for inspection on the day.

Stage 3 – Audit Visit

When visiting a provider, the audit team will discuss the audit on arrival with the named contact. This will include the reason for the visit, the process involved and any feedback which will be provided upon completion. No provider presence is required during the inspection process as the audit team will work autonomously and discretely, thus minimising disruption to the provider organisation/staff.

Visits should take between 1-2 hours depending on the client sample size. During this time, the audit team will check through the files held by the provider for each client and make notes on the evidence held. The aim will be to ensure that the paperwork held meets compliance requirements and matches the support logged on Helix. Mandatory supporting documentation includes:

- Valid Data Protection Statement
- Evidence for reported outcomes (see Outcomes and Progressions Definitions) including use of sustainment cycles
- Evidence for reported progressions (see Outcomes and Progressions Definitions)
- Case notes/evidence of service provision

Other supporting documentation (dependent upon the service provision) could include:

- Activity evidence (phone/email/letter/SMS)
- Attendance sheets for group/course sessions

Stage 4 – Feedback Summary

An informal summary of audit findings will be provided verbally to the named contact, with formal feedback provided in writing to the named contact and CCP contract manager within a given timescale thereafter. Written feedback should be provided no later than 30 days from site visit.

Following the visit, the audit team will prepare formal feedback for providers. This will include the client sample spreadsheet, showing what was found in both the Helix records and the hard copy records for each client, as well as some general notes. The client sample will be RAG rated, showing which files require urgent action (red), which need some work (amber) and which are suitable (green). A feedback summary sheet, which follows a template, will also be given to providers.

An email will be sent to the provider outlining the feedback from the visit. The email will contain two attachments:

- Client record feedback sheet – password protected. This provides comment on each file checked on the day. It is also RAG rated (green ok, amber needs attention, red is urgent action required)
- Monitoring visit sign off form – a sign off sheet for the provider's records, summarising the findings, making recommendations and noting further action required.

For example, should a file have no signed Data Protection Statement, feedback will state the provider will be required to gain one from the client retrospectively within an agreed time period. If a Data Protection statement cannot be produced within this period, the client record should be removed from Helix.

Stage 5 – Follow Up

Dependent upon the nature of the issues, remedial actions could include:

- Removal of clients from Helix
- Removal of outcomes from Helix
- Amended quarterly reports to reflect these changes

Where there are major issues with the client sample, the contract manager may decide to take appropriate action, as outlined in the Contract Management Escalation Process (section 4). Providers will be given timescales to rectify concerns raised in the feedback and follow-up visits could be scheduled to evidence that remedial actions have been taken.

The frequency of audits will be annual, commensurate with the stage of the funding/project. For example, during a three-year funding cycle, visits would be scheduled as follows:

- Year 1 – initial support visit for file management discussion.

- Year 2 & 3 – full audit visit as per five-step process.

Contract managers will use their discretion to decide on the necessity of audit visits and will communicate this with providers in advance.

3. **Capital City Partnership: Contract Management – Performance and Compliance Escalation Process**

1. Capital City Partnership manages contracts and grants on behalf of City of Edinburgh Council. It is CCP's responsibility to monitor performance and contract compliance and report this to CCP's board and CEC officers.
2. CCP prefers a partnership approach to contract management; early notification of any issues which are impeding contract performance can be discussed and rectified. If necessary, funding agreements can be altered and contract variations applied to reflect changing conditions. Quarterly reports and yearly contract meetings are used to highlight any issues and to make sure they are dealt with timeously.
3. However, in a small number of cases, it is necessary to implement performance or compliance measures to ensure that best value for public money is achieved. The following is an outline of what providers of services which are contracted managed by CCP can expect in cases of under-performance and non-compliance.

Contract issue	Notification	Process	Escalation 1	Escalation 2
Under performance: fewer engagements or outcomes than agreed or forecast at a specified period.	Provider notifies via either Helix or Quarterly report.	Contract manager requires meeting with project senior manager and/or report detailing how issue is being dealt with from provider. Issue is either closed or escalated.	Letter issued to provider highlighting issues and actions to be taken. Issue is either closed or escalated.	Provider is notified of reduction or termination of contract.

Contract issue	Notification	Process	Escalation 1	Escalation 2
Non-compliance found during CCP file audit. (Such as: evidence not collected for outcomes; data	CCP auditor reports non-compliance to Contract manager, deadline set for gathering of evidence or	Provider contacts Contract Manager to report on remedial action. Issue is either closed or follow up	If follow up visit shows that file compliance is still unsatisfactory then letter is issued to provider	Provider is notified of reduction or termination of contract.

protection agreement not held; insufficient evidence of service delivered.	removal of data from Helix.	visit is scheduled.	highlighting issues and actions to be taken. Issue is either closed or escalated.	

4. Outcomes and Progressions Definitions

No One Left Behind/Blended Employability Service

The information below is intended as a guide on best practice for collecting evidence. However, other forms of evidence may be accepted. If you are unsure whether the evidence you have is appropriate, please discuss this with your contract manager.

As per No One Left Behind (NOLB) guidance, all outcomes achieved by participants can be verified using a self-declaration form signed by a caseworker and the participant. This self-declaration form should be considered the minimum standard of evidence which would be accepted to verify an outcome for NOLB/BES funded projects. Where possible, further evidence which meets the Joined Up for Jobs evidence requirements as stated below should also be collected by providers.

STARTS AND INDIVIDUALS SUPPORTED

Please ensure all activities/outcomes in Helix are linked to the Programme you wish to claim against, to ensure these pull over into web reports.

Status	Definition	Evidence Requirements	Adding to Helix
Start/Engagement/ Assessment	First involvement with participant with view to engagement on project. Assessment and action plan completed. Placement of participant on applicable stage of pipeline.	Registration Form and Data Protection documentation to be signed and dated by client and caseworker. Helix updated with clients' details. Action plan signed and dated by both service provider and service user (can be done online on Helix).	In "Client" go to "New Client" and complete the wizard. This should add the activity "Started on Programme" in the client record which will be counted in the reports and shown as a new engagement. For all NOLB grant funded projects, you should be completing the "NOLB Post July 2022" wizard.

Status	Definition	Evidence Requirements	Adding to Helix
			When completing the wizard, certain fields are mandatory, while all fields listed are included as part of NOLB reporting to Scottish Government. It is important to consider the fields which are most relevant to your project, ensuring these are completed. For example, if you are funded to work exclusively with parents, then the "Parental Status" question must be answered as "Parent in a couple" or "Single parent". You should then also complete the "Family Information" question. For more sensitive, non-mandatory information, clients have the option of "prefer not to say" and this information should only be logged if a client discloses in discussion, without being asked.
Number of people	Number of clients supported over	Unique client IDs within Helix System to	Clients supported in the current financial

Status	Definition	Evidence Requirements	Adding to Helix
supported	a given period.	correspond to records of clients held by organisations (paper files and claim documentation).	year who have received support in previous years for this project will automatically pull through as individuals supported. Any activity linked to your programme with the relevant date (i.e. in the reporting period) will pull through to the report.

OUTCOMES

Status	Definition	Evidence Requirements	Adding to Helix
Outcome: Job Start - FT	At least 16 hours per week. Job entry must be within 26 weeks of last active engagement. A job claim is valid at start date but must also continue to be monitored at 4/13/26/52-week sustainment periods. All job outcomes achieved by a client should be logged in Helix, but there should be a focus on moving clients into long term, sustainable employment. As such,	Self-verification of a job from a client can count towards a job start outcome, but best practice is to get a Contract of Employment/Letter of employment plus wage slip to evidence actual remuneration for a period of employment. Job starts can be claimed immediately and associated evidence should be collected. Any future sustainment (4/13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Action", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Job Start - FT" and click to add. Add a status of "successful" and complete other outcome details as per wizard, then click "Save".

	only two job outcomes per client per financial year can be claimed. From 01.04.26 - 31.03.27, for a job to be classed as living wage, the rate of pay must be £13.45.		Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the Employment or MA. Please complete this at *each* of the sustainment periods before verifying the outcome. After the destination form, please click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence or are still waiting to reach the relevant sustainment date. Verified is when you have the evidence.
Outcome: Job Start - PT	Less than 16 hours per week. Job entry must be within 26 weeks of last active engagement. A job claim is valid at start date but must also continue to be monitored at 4/13/26/52 week	Self-verification of a job from a client can count towards a job start outcome, but best practice is to get a Contract of Employment/Letter of employment plus wage slip to evidence actual remuneration for a period of employment. Job starts can be	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Action", then

	sustainments. All job outcomes achieved by a client should be logged in Helix, but there should be a focus on moving clients into long term, sustainable employment. As such, only two job outcomes per client per annum can be claimed. From 01.04.26 - 31.03.27, for a job to be classed as living wage, the rate of pay must be £13.45.	claimed immediately and associated evidence should be collected. Any future sustainment (4/13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	"Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Job Start - PT" and click to add. Add a status of "successful" and complete other outcome details as per wizard, then click "Save". Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the Employment or MA. Please complete this at *each* of the sustainment periods before verifying the outcome. After the destination form, please click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence or are still waiting to reach the relevant sustainment date. Verified is when you have the evidence.

Outcome: Job Start – Self Employment	As job entry outcomes. Runs own business, not contractually bound to a specific employer as an employee.	Self-employment declaration completed stating number of hours worked in the business per week and date started self-employment, including name and address of company plus proof of trading in form of HMRC letter evidencing registration or Bank statement for a business account. Job starts can be claimed immediately and associated evidence should be collected. Any future sustainment (4/13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Action", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Job Start – Self Employment" and click to add. Add a status of "successful" and complete other outcome details as per wizard, then click "Save". Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the Employment or MA. Please complete this at *each* of the sustainment periods before verifying the outcome. After the destination form, please click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be

			changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence or are still waiting to reach the relevant sustainment date. Verified is when you have the evidence.
Outcome: Job Start - Unknown Hours	As other job entry outcomes. This outcome should only be used when a client is in work but the number of hours is not set as client works differing hours each week or is on a zero-hours contract. Notes can be used to confirm this. Please note this is not an outcome for providers to use if they just don't know how many hours their client has been contracted to do.	Self-verification of a job from a client can count towards a job start outcome, but best practice is to get a Contract of Employment/Letter of employment plus wage slip to evidence actual remuneration for a period of employment. Job starts can be claimed immediately and associated evidence should be collected. Any future sustainment (4/13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Action", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Job Start – Uknown Hours" and click to add. Add a status of "successful" and complete other outcome details as per wizard, then click "Save". Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the Employment or MA. Please complete this at *each* of the sustainment periods before

			verifying the outcome. After the destination form, please click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence or are still waiting to reach the relevant sustainment date. Verified is when you have the evidence.
Outcome: Job Start - MA	As other job entry outcomes. Client is in work as a Modern Apprentice.	Self-verification of a job from a client can count towards a job start outcome, but best practice is to get a Contract of Employment/Letter of employment plus wage slip to evidence actual remuneration for a period of employment. Job starts can be claimed immediately and associated evidence should be collected. Any future sustainment (4/13/26/52 weeks) can be self-evidenced by a client via	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Action", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Job Start - MA" and click to add. Add a status of "successful" and complete other outcome details as per

		email/phone call/text message etc.	wizard, then click "Save". Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the Employment or MA. Please complete this at *each* of the sustainment periods before verifying the outcome. After the destination form, please click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence or are still waiting to reach the relevant sustainment date. Verified is when you have the evidence.
Outcome: Progression: Education Full-Time or	Client begins a higher or further education course at college or university, either on a full or part time basis. Further or Higher	Self-verification from a client can count towards an education outcome, but best practice is to get confirmation from Educational Establishment as to enrolment on	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Progression: Education Full-

Progression: Education Part-Time	Education outcome start confirmed and client has been enrolled on course. The sustainment of the course should then be logged across 13/26/52 weeks.	course, course title, start and end date. Copy of matriculation or student ID card. Evidence of attendance obtained by service user from institution. Any future sustainment (13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	Time" or "Progression: Education Part-Time" and click to add. Add a status of "successful" and complete other outcome details as per wizard, then click "Save". Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the education outcome. Please complete this at *each* of the sustainment periods before verifying the outcome. Click "Add follow on template" and complete details to ensure 13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence or are still waiting to reach the relevant sustainment date. Verified is when you have the evidence.
Outcome: In Work Progression	Applies only to participants ***who were already employed on***	Self-verification of an in-work progression from a client can count towards an education	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then

	engagement with service. It is considered that participants have in work progression when they have either taken a job with a new employer or progressed to a higher skilled job with their current employer. The change must fulfil one of the criteria below: ○ requires higher competences, skills or qualifications ○ entails more responsibilities ○ promotion ○ move from precarious to stable employment (e.g., fixed term to permanent contract) ○ move from underemployment (i.e., involuntary part-time work) to full employment. ○ Other as agreed in advance	outcome, but best practice is to get auditable signed evidence (as agreed with contract manager) kept with service user's file. Need to include entry position, action undertaken and resolution of situation with discernible improvement in service user's situation with attached evidence (e.g. payslip, new contract or description of new work skills obtained) signed and dated by service user, caseworker and their line manager. An example of acceptable evidence would be: • Entry position evidence (payslip/contract) pre-intervention. • Outcome form detailing improvement in situation (higher pay, more hours, more skills/ competences/ responsibilities, promotion, moving to stable employment, move from underemployment). • New position evidence (payslip/contract).	click the three dots next to "Activity". Search for "In Work Progression" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence.

	by contract manager		
Outcome: Retained Employment	Applies only to participants ***who were already employed on engagement with service***. It is considered that participants have retained their employment when they have been supported to maintain their current role and without the support, may have become unemployed. In this case, the change must fulfil one or more of the characteristics below: ○ Client's job was at threat of redundancy ○ Client's circumstances changed and felt they could no longer sustain employment ○ Other as agreed in advance by contract manager	Self-verification of a retention from a client can count towards an education outcome, but best practice is to get auditable signed evidence (as agreed with contract manager) kept with service user's file. Need to include entry position, action undertaken and resolution of situation with discernible improvement in service users' situation with evidence thereof - signed and dated by service user, caseworker and their line manager. Alternatively, an official letter detailing the outcome of any intervention from the employer. An example of acceptable evidence would be: • Entry position evidence (payslip/contract) pre-intervention. • Outcome form detailing resolution to issues in the workplace. Evidence client retained role (payslip/contract)	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Retained Employment" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence.

Outcome: Referral	Service user progresses from one service to another which is further along the pipeline: stage 1/stage 2 provision to stage 3 and 4 services etc. This can be either an internal progression within your own organisation, or a progression to another organisation for support.	A statement should be completed as evidence by the provider acknowledging the progress onto a provision further along the pipeline. A note in the outcome on Helix would be enough here and should state who the referral was made to and why.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Referral" and click to add. Complete other outcome details as per wizard, then click "Save". Please note, this does not automatically refer a client to another organisation via Helix. If you wish to make a referral via Helix, please first ensure you consult the referral organisation then in the client summary, go to Actions then Referral. This is not necessary to claim a Referral outcome. If you have made a referral to another organisation out of Helix and the other organisation require the access to the client's details, they can perform a share request on the system.
Outcome: Re-engage with	Outcome specifically for young people still of high school age	A formal statement from the client's high school confirming their re-engagement with	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then

education	who have left school and are working with an employability organisation, who have then helped young people return to high school. The sustainment of the outcome should then be logged across 13/26 weeks.	school. This can be in writing via email or a letter.	click the three dots next to “Activity”. Search for “Re-engage with education” and click to add. Complete other outcome details as per wizard, then click “Save”.

SUSTAINMENT MONITORING, DESTINATION AND LIVING WAGE

The above table details the outcomes that will be included in Providers' Funding Agreements and will be included in their targets. However, although not included in targets, other information Scottish Government require as part of NOLB data collection is also included in Helix. This includes Sustainment Monitoring, Job/Education/Volunteering destination forms, and Scottish Living Wage information.

Sustainment monitoring

As detailed in the table above, all Employment and Education outcomes need a sustainment cycle. For Employment this tracks their employment after their Job Start at 4, 13, 26 and 52 weeks; for Education this tracks at 13, 26 and 52 weeks. To create a sustainment cycle, after the outcome has been added to Helix there is a button called “Add Follow On Template”. You should then select the correct programme from the drop-down menu. You can also activate a reminder alert which will appear in your Helix calendar and Alerts (both accessed from the top green bar of Helix) before saving. This will automatically create the cycle linked to the initial outcome. These sustainments will automatically appear in the

“Activities and outcomes”. Please note, when the sustainment time has lapsed, evidence needs to be obtained verifying that sustainment and a Destination form is required to be completed (see below).

Job and Education Destinations and Scottish Living Wage

Once a Job, Education or Volunteering Outcome has been created, a destination form will be required. The following destination forms will be available for each outcome:

Job Outcome: Destination - Employment, Modern Apprenticeship or Self Employed (2025). This includes: Employer Name; Contract Type; Number of hours worked per week; Rate of Pay; Sector; Scottish Living Wage; and whether the role is a Modern Apprenticeship.

Education Outcome: Destinations – Further/Higher Education Outcomes (2025). This includes: Date Course Starts; Date Course Completes; Date FE/HE qualification achieved; Level of FE/HE qualification achieved (ISCED levels); Name of FE/HE qualification; Name of the College, University, etc.

Volunteering Outcome: Destination - Volunteering (2025). This includes: Volunteering Start Date; Volunteering End Date (if Known); Where is the client volunteering; How many hours per week is the client volunteering for?

OUTPUTS

Status	**Definition**	**Evidence Requirements**	**Adding to Helix**
Progression: Qualification gained or Progression:	Any training delivered by your project such as: Qualifications: a Qualification	Copy of certificate awarded, or printout from service user’s SQA record showing certification or email, or document signed and dated from trainer confirming dates and hours of	In client’s summary, go to Actions, then Actions and Outcomes. Click “Add” then click the three dots next to “Activity”. Search for the relevant training activity.

Vocational Training or Employability Training	accredited by an awarding body such as SQA and non-certificated vocational training courses. Includes short courses at college or university. Vocational Training: Successful completion of modules, units, or assessed training courses accredited by SQA or other national body. Training is specific to a sector or job role (CSCS, Food Hygiene etc). Employability Training: upon completion of an employability skills course such as Certificate of Work Readiness, Employability Award etc. This could be an in-house employability course with a certificate upon completion. Your Funding Agreement should outline what activities you should use for the types of training you	attendance.	Please note the following are the only ones that should be used: • "Qualification Gained", • "Progression: Vocational Training", • "Employability Training" Select which type of training it is from the drop-down menu. Complete other outcome details as per wizard, then click "Save". Please do not use other options such as "Offered Training Course", "Started Employability Training", "Started Training Course", "Started Vocational Training", "Completed Vocational Training", "Completed Training Course" or "Completed Employability Training" as none of these are used to record outputs. You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence.

	are delivering. Please note, this is not to be used when you refer someone on for training with another organisation.		In the period, if you have recorded different types of training outcome, the Programme Outcomes Export web report will sum together the individual clients who have achieved a training outcome of any kind. You can find this under 'Training Outcome - Unique individuals' and this is the figure to include under Training in your report.
Progression: Started Volunteering	A person giving of his/her time and energy through a third party or in-house. It will benefit both the person and others, including individuals, groups and organisations, communities, the environment and society at large. Some volunteering may include a financial allowance. Volunteering opportunities can be bespoke, with no minimum/maximum number of hours required or weeks completed before claiming. It is	Self-verification form completed by client and caseworker. Email, or document signed and dated, from appropriate representative of placement provider confirming dates and hours of attendance.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Started Volunteering" and click to add. Complete other outcome details as per wizard, then click "Save". Upon completing the wizard, a destination form should then appear on screen. This allows you to record the details of the volunteering outcome, including start and end date. You have status options that can be changed related to the evidence you have

	important to log a start date with the details of the volunteering being undertaken, and an end date when this opportunity is completed.		so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the volunteering progression, including the start and end date. Please complete this before verifying the outcome.
Progression: Started Work Placement/ Experience	A work placement is a formal, set period placement with an employer to enable a participant to gain practical training and experience in a relevant and challenging workplace environment with a view to providing the participant with the necessary skills, confidence and references to enhance their employment prospects. Should a client gain employment through Edinburgh Council's 6-month work placement scheme,	Self-verification form completed by client and caseworker. Email from appropriate representative of placement provider confirming dates, placement activity and hours of attendance or document signed and dated by the placement provider.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Started Work Placement/Experience" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the Work Experience

	this should be recorded as Started Work Placement/Experience, rather than as a Job Start.		progression. Please complete this before verifying the outcome. When client has completed the placement, in client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Ended Work Placement/Experience" and click to add. Complete other outcome details as per wizard, then click "Save".
Welfare Rights Advice	Welfare rights encompass the right to access and receive the maximum entitlement to state welfare benefits and to be treated fairly by the welfare system. For some organisations, this is a key part of the support they provide and may be included in funding agreements or contracts.	This is an activity which should be delivered in-house. No evidence is required to claim this activity on the system but useful information to include in reports is the number of people receiving this support and the financial gains from this support.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Welfare Rights" and click to add. Complete other outcome details as per wizard, then click "Save".
Client exits	Client exits a programme, either	If client has progressed in to	In client's summary, go to Actions, then

programme	progressing to employment/education/further training or has disengaged from programme. Please note, clients can be exited from the programme and their sustainment cycle will still be active – providers don't have to wait until the end of the clients' sustainment cycles to exit them if all other work has finished.	employment/education/further training, this outcome should be added prior to exiting the client from the programme, with associated evidence collected. If client has disengaged, details of disengagement should be added to noted on Helix activity.	Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Exited Programme" and click to add. Complete other outcome details as per wizard, then click "Save". Also ensure that your caseworkers are no longer linked as active with the client in the details section or this client will continue to appear in the caseload list.

Communication and Branding

A requirement of your funding is to ensure all paperwork meets the requirements as set out by the funder. Please note that each funder has a different set of requirements when it comes to branding/logos to be used on paperwork. In this instance, paperwork should include marketing materials used to promote the project and paper copies of registration paperwork such as registration forms or referrals forms.

5a. No One Left Behind

Providers delivering services under the No One Left Behind are expected to use the following logos on their marketing materials/paperwork:

- Scottish Government (Saltire Logo)
- City of Edinburgh Council
- Edinburgh Guarantee
- Joined Up for Jobs

5b. Blended Employability Service

Providers delivering services under the Blended Employability Service are expected to use the following logos on their marketing materials/paperwork:

- City of Edinburgh Council
- Edinburgh Guarantee
- Joined Up for Jobs

All logos are also available from the Local Employability website for ease within the Members Area.