



## Building a progression culture

Exploring learning organisations' use of The Progression Matrix

Nicki Moore and Tristram Hooley

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### Foreword

#### The Progression [W]hole

There is a 'hole' in our concept of education, a progression hole; a telling gap between what education is for, its fundamental purpose in preparing learners to flourish after they have left school, and the measures we use to judge if it is working. While attainment is of core significance to each learner's future prospects, the reality of an excessive focus on these outcomes as a judge of educational success is a diminishing attention to the broader development needs of learners. We must shift our focus from attainment to progression if we are to ensure that it fulfils its purpose for every learner.

Current and emerging education policy presents many challenges in this, however. The drive towards localism has been accompanied by unprecedented financial constraint and change. This means that the desired institutional autonomy can feel like isolation for the education providers who are making sense of a sea of changes without the range of centralised and national support programmes that were previously in place. But I see opportunity. Local institutions are best placed to understand and address the needs of their learners. Local autonomy provides both the necessary freedom and impetus to explore creative solutions to the persisting challenges of educational disadvantage and to define education in broader terms more relevant to the complexity of the modern world, that is: progression.

The evolution of the national Aimhigher programme encouraged widening participation professionals, within the context of higher education, to gain a deeper understanding of the concept of progression. An increasing focus on individual learner needs, and incremental and progressive programmes provided the foundation for a new progression framework for all learners and not just for those considered as having potential for university. The result was a new approach to progression applicable at every level from the individual and personal to the institutional and strategic.

The Progression Matrix provides both a meta-concept and a practical framework for the progression challenge. The report shows that redefining organisational planning in broader learner progression terms can provide a unifying vision for disparate curricula, support and intervention streams. This has implications for value for money, resource deployment, staff development, curriculum design and delivery, and most importantly learner success. The flexibility and simplicity of The Progression Matrix has allowed learning organisations to apply its principles directly to their learners' aspirations, awareness and attainment needs and senior leaders have found the concepts powerful in the development of organisational vision and strategy.

This report provides an insight into some of the experiences of professionals who have used The Progression Matrix. However, as much as the report articulates the central importance of a shift to progression-focused education, it also highlights key unanswered questions. It establishes the need for considerable further work by researchers, education practitioners, leaders and policy makers. What is needed is an education system that fulfils its long-term learner progression purpose. It is time for a progression revolution.

#### **Philip Dent**

Director

Aimhigher Coventry and Warwickshire

### Executive summary

This research paper explores the implementation of The Progression Matrix in schools, colleges and other learning organisations such as training providers. The project builds on existing research on The Progression Matrix and finds evidence which suggests that the approach provides a useful conceptual model around which learning organisations can re-orientate their practice and deliver enhanced progression for learners.

The central concept which is expressed in The Progression Matrix is the idea that “progression” can and should form the centre of the mission of learning organisations. Furthermore the approach is based on a conceptual understanding of the way in which learners progress through life. Learners’ ability to progress is understood to be comprised of their:

- **aspirations** about the future and their confidence and self-efficacy;
- **awareness** of options and opportunities; and
- educational **attainment**.

The model also sets out an approach to supporting progression that involves learning organisations building a structured approach which addresses the three aspects of aspiration, awareness and attainment.

Many of the educators interviewed in this research felt that the education system within which they worked had become overly focused on the idea of educational attainment and that re-orientating around the idea of progression could be a necessary and powerful corrective. Learning organisations that are focused on progression cannot operate as “exam factories” but rather focus on the needs of the learner, offering them an educational experience that interacts with their self-image and understanding of the world and supports them to fulfil their potential rather than to perform for a test.

The UK is currently in the process of considerable change in its education and employment system. This paper argues that the concept of progression and the principles and applications of The Progression Matrix are valuable in helping to support learners to make meaningful journeys through this changing environment. In particular it may be able to help learning organisations to manage changes in their responsibilities to learners and to develop a coherent approach to the increased autonomy that they are being asked to exercise as well as the growing requirement to deliver positive and quantifiable outcomes for learners. Progression is a term which has currency amongst both educators and policy-makers although it is also important to recognise that it is frequently used in narrower and less precise ways than in The Progression Matrix.

The paper sets out the findings from a four month action research project which sought to build on existing implementation of The Progression Matrix. Key findings are set out below and are followed by a series of questions which learning organisations can use to help to develop their practice.

### Project findings

#### The nature of progression

- Progression is about the relationship between the individual and the world around them.
- Educators who participated in the project were keen to see progression as more than just educational attainment. For many the concept of progression was a broader concept that related to personal development and an individual's career and life journey as well as the achievement of qualifications.
- Many learning organisations provide a range of activities to support learners' progression. However these often consist of a range of unconnected interventions which do not relate to each other or explicitly to the concept of progression and do not form part of a cohesive progression strategy and plan.
- Many organisations have embraced The Progression Matrix as a way of connecting diverse approaches and creating a coherent learner experience.

#### Re-orientating learning organisations around the concept of progression.

- The climate of change in educational policy and funding has driven a need in many organisations to consider how they handle issues relating to progression.
- In addition to the external drivers many participating learning organisations felt that a greater emphasis on progression better represented their organisational mission than their existing practice.
- However, many participants also recognised that achieving change within their organisation was likely to be challenging.
- Participants felt that if learning organisations were going to become more progression focused they would need to develop staff and engage at a strategic level with making this change.
- An additional key challenge that was identified was how learning organisations could engage their wider stakeholders in this re-orientation around progression.

#### The impact of an enhanced focus on progression

- Participating organisations reported that engagement with the concept of progression had helped them to change and improve organisational strategy and management, and learner outcomes.
- The Progression Matrix was enthusiastically embraced by a number of the participating organisations.
- At strategic level The Progression Matrix has allowed learning organisations to:
  - o rethink their core mission;
  - o link a number existing activities and explore how they relate to the metrics around which learning organisations are judged;
  - o empower learning organisations to make purposeful choices about externally offered provision; and
  - o re-examine their provision and develop a programme of support to address all elements of the progression equation.
- At a management level The Progression Matrix has allowed learning organisations to:
  - o develop a common language and common approach around progression;
  - o underline the need for secondary schools to work collaboratively with primary schools on aspiration in order to improve their key stage 4 attainment outcomes;
  - o embed new approaches to teaching and learning from a content focused and teacher led approach to a more interactive, learner led pedagogy; and
  - o provide a rationale for changing practices.
- At a learner level The Progression Matrix has allowed learning organisations to:
  - o improve individuals' long term aspirations and goals;
  - o reinforce strong messages about the purpose of learning and its place in an individual's overall career pathway; and

- o help learners to understand how their skills and qualifications will support future moves in learning and work.

### **Where next?**

- Learning organisations who participated in the pilot recognised that they had been unable to realise the full benefit of The Progression Matrix within the time frame. Many were keen to take this forward in the future and particularly emphasised the opportunity to apply it further at a strategic level.
- There were also a number of areas where participants suggested areas for further development of The Progression Matrix. In particular they suggested a range of additional resources and support that they would like as they take the approach forward.
- Finally it is argued that there would be advantages to the educational system as a whole if The Progression Matrix was acknowledged and supported at the policy level.

### Questions

The following section summarises the questions which appear throughout the report. The questions have been developed by the research team in response to interactions with professionals from a wide range of organisations. These questions are designed to be used by learning organisations to support the development of their approach to enabling progression.

- 1 What approach is your learning organisation taking in relation to the range of responsibilities relating to progression which were previously managed or supported externally to the learning organisation?
- 2 What do you know about what happens to your learners once they leave your organisation?
- 3 How can you be sure that learners are able to progress after they have left your organisation?
- 4 Is there anything that you need to put in place to help you manage, monitor and review learners' progression more effectively?
- 5 What processes does your learning organisation have in place which helps learners to become discerning consumers in the education market?
- 6 How do you define progression?
- 7 What is the understanding of progression amongst your organisation's staff? How do they see it intersecting with their roles?
- 8 How does the idea of progression relate to your organisation's vision, mission or culture?
- 9 What does your organisation do to identify and support the progression requirements of learners arriving on, moving through, and leaving your programmes?
- 10 How do you measure the effectiveness of this support?
- 11 How do your processes help learners develop a sense of their educational programmes as part of their longer term progression?
- 12 What processes does your organisation have for the identification of continuing professional development needs of staff regarding progression support?
- 13 How are staff supported to develop their competence in supporting progression both individually and collectively.
- 14 How do you talk to learners about the idea of progression? What activities do you have to help them to make sense of this idea in the context of what they are doing?
- 15 How do you communicate ideas about progression to parents and other stakeholders?
- 16 What do your partners understand by the term progression?
- 17 Is there a shared vision or partnership approach to progression support in your consortia or learning community?
- 18 What processes and opportunities exist for sharing and developing good practice in progression support within your partnership or learning community?
- 19 Could the existing policy framework be enhanced through a greater understanding of how learners progress?

### 1. Introduction

*'I am suffocated and lost when I have not the bright feeling of progression.'*

**Margaret Fuller (Quoted in Von Mehren, 1996, p.55)**

Progression and the idea of progress have been an important rallying cry for humanity. When the nineteenth century writer and reformer Margaret Fuller was writing about her own need for progression she lived in a world in which the opportunity to realise your potential was denied to the majority on the grounds of socio-economic status, gender or race. Maximising the opportunity for progression has been one of the principle aims of social reformers and educationalists throughout the last two centuries and yet, despite this, Fuller's sense that without the opportunity for progression the individual is suffocated, still echoes powerfully down the years.

This research paper will argue that progression provides a useful and timely concept around which educationalists and policymakers can mobilise. This concept offers an opportunity to think about education as an activity which is primarily about empowering people to move purposefully through their lives and to connect learning with their life, work and society. Progression relates to existing concepts such as careers and personal development as well as to the idea of the learner centred curriculum. This report will show how the concept of progression connects these different agendas and provides a common language through which stakeholders can communicate.

The research paper will present a conceptual model that argues that learners' progression is dependent on their:

- **aspirations** about the future and their confidence and self-efficacy;
- **awareness** of options and opportunities; and
- educational **attainment**.

The model also sets out a framework to support progression that involves learning organisations building a structured approach which addresses the three aspects of aspiration, awareness and attainment.

Many of the educators interviewed in this research felt that the education system within which they worked had become overly focused on the idea of educational attainment and that re-orientating around the idea of progression could be a necessary and powerful corrective. Learning organisations that are focused on progression cannot operate as "exam factories" but rather focus on the needs of the learner, offering them an educational experience that interacts with their self-image and understanding of the world and supports them to fulfil their potential rather than to perform for a test.

The research presented here focuses around an educational framework called The Progression Matrix. The Progression Matrix emerged from the Aimhigher agenda to widen participation in UK higher education, but, as will be demonstrated, the concept of progression, which it both conceptualises and operationalises, has been found to be much more widely applicable. The development of The Progression Matrix will be traced in chapter 2 along with the rationale for broadening its focus out beyond the arena of transition to higher education. The rest of the research paper will then go on to set out the findings from a four month action research project which sought to build on existing implementations of The Progression Matrix, explore learning organisations' understanding of the idea of progression and to engage them in developing, extending and deepening their approach to progression.

The findings of this report have been used to generate a series of questions. Unless otherwise specified these questions are designed for learning organisations to use to review their practice. Questions are presented and highlighted throughout the report and are summarised in the Executive Summary for ease of use.

### 1.1. The context for developing progression

The UK education system is in a period of considerable change following the election of the Coalition Government in 2010. Existing policy agendas have been swept away by a raft of new thinking, reviews and policy changes. In particular the Government has (largely) accepted the conclusions of major reviews of higher education (Browne et al., 2010) and vocational education (Wolf, 2011) as well as bringing a new Education Bill (soon to be Act) which amongst other things considerably heightens the responsibilities of schools through an emphasis on school based autonomy. Alongside these policy developments the existing infrastructure that supported progression in England (e.g. Aimhigher, Connexions and Education Business Partnerships) has been removed, reduced or reconfigured (Hooley & Watts, 2011). It is therefore worth reviewing briefly some of the features of the new policy environment as they relate to the idea of progression.

Progression is a broad concept that encompasses transitions to and from learning organisations (including transitions to the labour market) and learner journeys within learning organisations. Because of this the concept of progression overarches almost every aspect of educational, social and labour market policy. If progression describes an individual's journey through life, learning and work then most of what the government does is likely to shape the progression environment. Earlier research around the policy context for The Progression Matrix identified a wide range of ways in which The Progression Matrix could link into different aspects of government and local government policy (Leonard, 2010). As the Coalition Government has become more established the shape of its policy has become clearer and its approach to individual's progression through life, learning and work has begun to manifest in policy and spending decisions. So recent policy initiatives around the Big Society, social mobility, fair access to higher education and equality and diversity all contribute to the environment within which learning organisations manage the progression journeys of their learners.

It is certainly the case that many of the key players in the new government are using the language of progression when they talk about education policy. Michael Gove asked Alison Wolf to "consider how we can improve vocational education for 14-19 year olds and thereby promote successful **progression** into the labour market and into higher education and training routes" (Gove, 2010), while John Hayes situated the role of career guidance in terms of "unlocking access to learning and **progression** for those facing disadvantage, helping them become socially mobile" (Hayes, 2010). The government is keen to re-focus the learning and skills system as one which concentrates on learners progressing onwards and ultimately into the labour market. If learning organisations fail to deliver and demonstrate progression they are likely to experience greater challenges in the future.

It is possible to define three cross-cutting policy themes which seem likely to interact with how learning organisations develop practice in relation to progression.

- Increased autonomy for learning organisations
- Increasing pressure to deliver outcomes
- The individual as a consumer of education

#### 1.1.1. Increased autonomy for learning organisations

The Department for Education makes the case for increased autonomy for schools in the White Paper, The Importance of Teaching (DfE 2010).

*'In England, what is needed most of all is decisive action to free our teachers from constraint and improve their professional status and authority, raise the standards set by our curriculum and qualifications to match the best in the world and, having freed schools from external control, hold them effectively to account for the results they achieve.'*

**DfE (2010)**

An important element of this initiative and relevant to this study are the proposed removal of schools' statutory responsibilities associated with the careers curriculum and the introduction of new duties to provide access to external impartial career guidance for all learners through the proposed legislation contained in the Education Bill 2011. The impact on schools is likely to be considerable. With no new resources allocated to schools to manage this new requirement, head teachers will need to ensure that responsibility for commissioning services is undertaken in a timely and cost effective manner.

A key aspect of this increased autonomy has also been the move towards academy status for many schools. This effectively distances them from the legislative requirements placed on state schools. There has also been a simultaneous removal of the wider statutory and non-statutory responsibilities such as those for supporting curriculum development which were held by Local Authorities as well as by other agencies such as Connexions and Aimhigher. In some areas the changes have created a vacuum into which new market players have moved offering schools a variety of resources and services. Schools therefore need a mechanism to help them make discerning choices about what they are focusing on, how they allocate internal resources and what external provision they might seek to buy.

These changes are asking fundamental questions of schools and other learning organisations. While in the past much of the responsibility for progression sat external to schools with Connexions, Aimhigher or other bodies, increasingly schools will have to decide not only who they are going to commission, but also what. In the terms of this paper, they gain responsibility for constructing a progression strategy or progression curriculum and so will need to develop a coherent, meaningful and high quality framework for learners.

One participant in a workshop conducted as part of this project (June 2011) noted that 'Connexions is changing shape and it's difficult to say what we will be able to do'. This anxiety and uncertainty goes beyond the loss of Connexions and ultimately requires new thinking from learning organisations.

**Question 1:** What approach is your learning organisation taking in relation to the range of responsibilities relating to progression which were previously managed or supported externally to the learning organisation?

### 1.1.2. Increasing pressure to deliver outcomes

The Coalition government has communicated its intention to reform education by reducing bureaucracy and increasing the professionalism of teaching staff to make learner centred judgements about provision. This freeing up of education however will be accompanied by a movement towards increased accountability for learner progression.

*"For both primary and secondary schools, we will put greater emphasis on the progress of every child – setting out more prominently in performance tables how well pupils progress... We will introduce a measure of how young people do when they leave school."*

**DfE (2010a)**

This view was reinforced by John Hayes the Minister for Skills who stated

*'It is important that schools are held to account for the quality of the services they secure and the impact they have on the progression of pupils.'*

**John Hayes, ACEG annual Conference, July 2011**

The current policy discourse is using the term "progression" to mean both progression within school, ultimately resulting in attainment of qualifications and progression from school, ultimately resulting in a successful transition to either post-secondary education or the labour market. Thus the rationale for the introduction of a new progression measure is to

*'Make schools and post-16 providers accountable for ensuring that all their pupils take qualifications that offer them the best opportunity to progress and receive the support needed to prepare for and complete that transition'.*

### **DFE presentation to the IAG stakeholder group 5th May 2011**

One of the things that this report will show is that The Progression Matrix provides a framework for schools and learning organisations to consider these things together.

An outcome focused policy context creates an environment in which learning organisations have the responsibility for the progression of learners. However, as learners' destinations are outside of the immediate control of the learning organisation, they are likely to need to find a basis for engagement and co-operation with other stakeholders. In order to facilitate this there is a need to develop a common understanding and language around progression and mechanisms for communication and shared working.

While there have been some concerns about the logistical aspects of the new progression measure and the measure's reliability, the idea that learning organisations should attend to the progression of their students is an appealing one. However, again it raises fundamental issues for learning organisations both in terms of their processes and in terms of their understanding about their purpose and notions of what constitutes a job well done.

**Question 2:** What do you know about what happens to your learners once they leave your organisation?

**Question 3:** How can you be sure that learners are able to progress after they have left your organisation?

**Question 4:** Is there anything that you need to put in place to help you manage, monitor and review learners' progression more effectively?

### **1.1.3. The individual as a consumer of education**

The Coalition government's policy has sought to locate responsibility, and arguably control, for education with the individual. A variety of personalisation and marketisation strategies are being developed to locate education as primarily serving the individual and subject to the same kinds of market pressures as any other kind of commodity. The changes to higher education illustrate this philosophy clearly, but the Government's changes to schools (discussed in 1.1.1) are less effective in putting the individual in charge and have largely located responsibility at the school level.

The raising of the participation age to 17 in 2013 and to 18 by 2015 will have the effect of compelling a range of new consumers into participating in this education market. The new duty does not compel young people to 'stay on at school' but rather invites them to identify and access provision that meets their particular needs. The yoking together of compulsion with consumer choice is conceptually difficult, but will create a strong imperative for learners to think about their progression and for learning organisations to create offers that are able to engage this group of learners.

In relation to higher education the philosophy of placing responsibility for education with individuals has been clearly set out (DBIS, 2011). However the review by Browne et al. (2010) recognised that the idea of the informed higher education consumer was only going to be a possibility if young people were supported in making wise decisions whilst they were still at school. In essence this delivers a new curriculum outcome to learning organisations. In addition to the delivery of their core curriculum they also have to ensure that students

are able to make consumer decisions within a complex market of learning choices and manage their progression. In other words learning organisations are being asked to attend impartially to learners' progression and to ensure that they have an awareness of the range of options that exist.

The progression model that is suggested by the Browne review locates the barriers to young peoples' participation in higher education in the lack of available information. It is important that young people understand what higher education is, what it costs, what it offers and where it can be accessed. However if this new policy is also to facilitate social mobility it is also important that attention is paid to the development of learners' aspirations. Progression decisions have many features that are similar to other market decisions (such as buying a car or stereo) but they also have features which make them different. Progression decisions about education and career differ from more straightforward consumer choices as they are deeply intertwined with personal, cultural and family identity (Stanley and Goodlad 2010) and, in the case of higher education, because payment is deferred over the lifetime, are necessarily based on inexact calculations about future income. Simon Hughes' recent report for the government addresses the issue of aspiration and recommends that learning organisations attend to progression throughout the learner journey rather than merely at the point of decision making. (Hughes 2011). While government policy may seek to locate individuals as educational consumers, it is important to recognise that the nature of consumption of education is highly complex. If learning organisations take on the responsibility to prepare their learners to operate effectively within this learning market it is likely to require sustained engagement with issues of aspiration, awareness and attainment.

**Question 5:** What processes does your learning organisation have in place which helps learners to become discerning consumers in the education market?

### 1.2. What is The Progression Matrix?

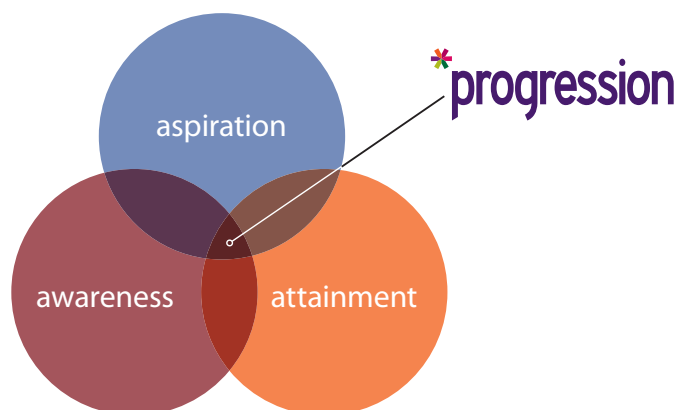
The Progression Matrix is an educational framework which has been developed by three Aimhigher partnerships to support their work with schools and other learning organisations. The authors of The Progression Matrix – a systematic approach to help individuals achieve their potential (Garton, Burch & Dent, 2011) describe the underpinning approach in the following terms.

*Progression is growth; it is discovering, developing and doing. It is the learning and the reason for doing it; it is the journey and the destination; the road and the map; the track and the train. It is achieving your goals and making bigger ones at the same time. It is choosing what to do and knowing where it will take you, and believing you can get there. At its best, progression is 'I want to and I know how to and I am able to so I will'. Or as we like to say:*

**aspiration+ awareness+ attainment = progression**

*The equation presents a model which can support a lifelong approach to life and career development. The three elements of aspiration, awareness and attainment provide a conceptual approach that can be used to organise the formal and wider curriculum, and associated learning support provision, to enable improved learner progression. The equation provides a useful way to convey these concepts, but it is also important to recognise their inter-relationship. Correspondingly The Progression Matrix documentation often represents them in the form of a Venn diagram as can be seen in figure 1.*

**Figure 1: The components of progression**



[Source of diagram: Garton, Burch & Dent, 2011]

The elements of aspiration, awareness and attainment are at the heart of The Progression Matrix approach. Learners are most able to progress when all three elements are in place and the synergy between them is maximised. These three elements and the importance of addressing them together forms The Progression Matrix' underlying analysis about how people make their journeys through life, learning and work. As will be shown later on in this paper, much of the appeal of The Progression Matrix for both learners and educationalists lies in the straightforwardness of this equation. However, the model has been developed through an iterative action research process in which the academic basis of the equation was examined (Stanley & Goodlad, 2010), its policy relevance explored (Leonard, 2010) and a pilot evaluated (Kewin, Hughes & Sheen, 2010). The current project is therefore the latest phase of the evidence based development of the model.

The equation provides a shortcut to the conceptualisation that underpins The Progression Matrix approach. The concept identifies the determinants of progression so that every factor can be addressed within the framework (Stanley and Goodlad 2010). Clearly there are a range of social, economic and cultural factors which also play a role in shaping the individual's progression journey. The Progression Matrix approach is not blind to these factors, but seeks rather to provide a flexible framework within which learning organisations can seek to address them. The Progression Matrix provides a framework for action which organisations can apply in a variety of ways to meet learners' needs.

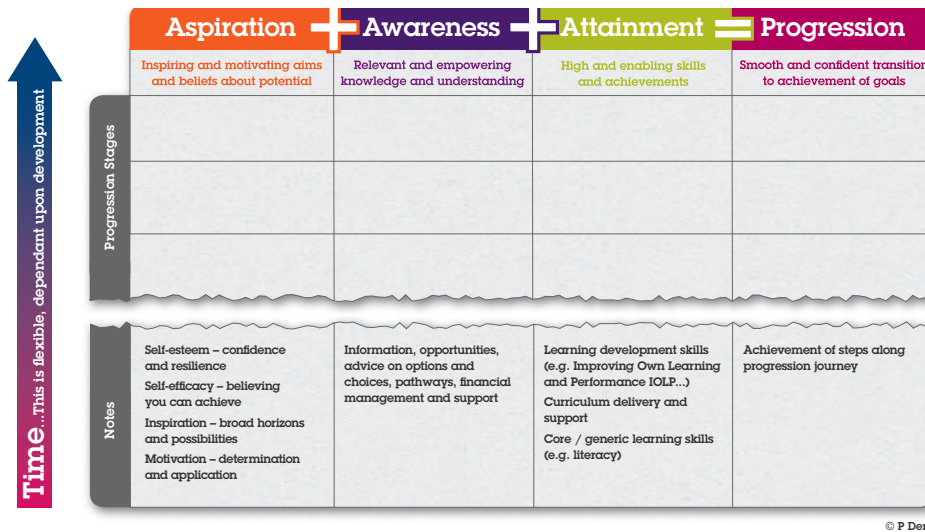
The Progression Matrix approach therefore proceeds from an underlying analysis of the importance firstly of the concept of progression and secondly of the idea that progression is comprised of aspiration, awareness and attainment. The model places the development of this conceptual understanding as the central part of its intervention within learning organisations. However on top of this conceptual understanding The Progression Matrix has also provided learning organisations with some tools and processes to support them in thinking and planning.

The tools are designed to be used at a range of levels to support:

- organisations to examine and develop their strategic aims and organisational mission;
- practitioners and organisations to articulate the range of support that is available through curricula and extra-curricula sources;
- individuals in identifying their goals and working out how they can best achieve them.

The key tool that has been developed to do this is The Progression Matrix itself. The Progression Matrix is a planning tool which enables the mapping and development of strategies, approaches and activities over time. An example of The Progression Matrix can be seen in Figures 2 and 3 with further examples of practical applications contained in section 3 and in the appendices of this report).

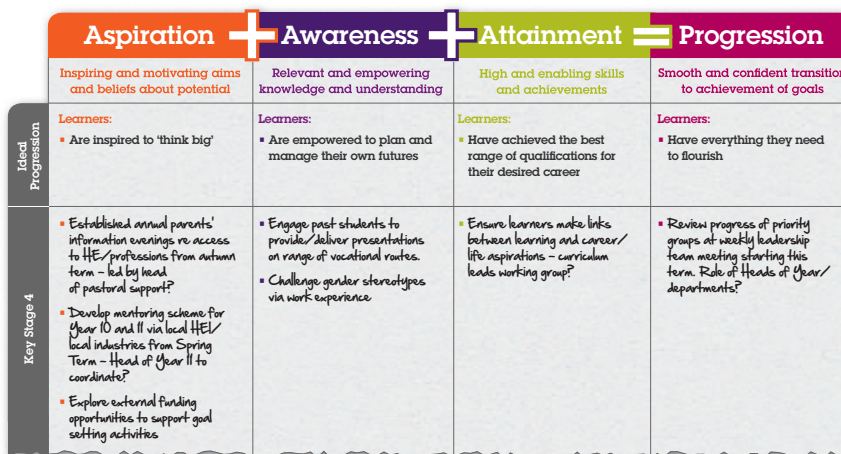
Figure 2: A blank Progression Matrix



[Source of diagram: Garton, Burch & Dent, 2011]

Figure 2 illustrates how the components of progression combine together. To create a matrix

Figure 3: A partially-completed example Progression Matrix for key stage 4 learners in a school setting



[Source of diagram: Garton, Burch & Dent, 2011]

Figure 3 illustrates the planning undertaken by a school's senior management team who have used The Progression Matrix to begin to highlight some themes which impact on a learner's progress.

Crucially this tool does not establish a curriculum, but rather leaves learning organisations to define their wider academic and personal development curriculum within the framework. Learning organisations are free to assess learner needs, develop learning outcomes and create their own context-specific approach and activities within this framework. Alternatively they can borrow learning outcomes from appropriate sources such as subject based curricula or career learning frameworks like the Blueprint (see LSIS, 2010). The Progression Matrix therefore forms a meta-framework through which learning organisations (or individuals) can organise a variety of different agendas and activities whilst ensuring that they stay focused on the progression of learners.

The flexibility of The Progression Matrix means that the approach has implications beyond the Aimhigher/transition to HE context within which it was developed. Garton, Burch & Dent (2011) hypothesise that The Progression Matrix could be used by college principals and head teachers to develop learner journeys and drive organisational development; by employers as part of workforce development strategy; by career guidance practitioners to create frameworks within which to manage clients' development; by the probation and prisons system to help manage the progression of offenders and ex-offenders and by unions and community development activists to support both individual and collective development. In addition to this array of uses the lifelong and meta-framework nature of The Progression Matrix means that it can also be used to provide a way for these different organisations to speak to each other and to develop the learner's journey across all of these contexts.

### 1.3. The story of The Progression Matrix

The Progression Matrix has its origins in Bristol in 2004 when Phil Dent was working in a school simultaneously managing the Aimhigher/progression to HE, learning mentor and gifted and talented agendas. The atomised nature of this funding made it challenging to manage, especially when learners were often supported through more than one stream of funding. Phil recognised that all of these agendas, along with much else that was taking place in the school, were essentially about helping learners to progress within and beyond the school. By slicing the learner's experience into small pieces, with each piece managed separately the school was wasting time and resource, but perhaps more importantly, learners were missing out on opportunities to build connections between the different elements of their learning experience. The progression equation was therefore born out of the desire to build a holistic and progressive learning experience.

When Phil Dent then moved to manage Aimhigher Coventry and Warwickshire he took the equation with him and further developed the concept into The Progression Matrix. At this point Aimhigher's delivery model was activity focussed. Aimhigher offered a range of activities from a menu and learning organisations often chose activities based on criteria such as the availability of curriculum time, the time of year, or on the numbers of students seen to require support.

*'It was like an HE progression travelling salesman opening a suitcase and saying 'do you want any of these?'*

**Liz Garton, Aimhigher West Partnership Manager**

The idea that learners can be transformed through short high energy interventions is appealing as it enables initiatives such as Aimhigher to bypass challenging engagement with schools and their curricula. However, in effect this approach resulted in a failure to build connections across the different elements of the learner's experience. Research evidence around successful school-based career development interventions suggests that strong partnership between teachers and career development professionals and between the academic and wider curriculum can support learners not only to progress in career terms, but also to progress academically (Hooley, Marriott & Sampson, 2011). The message is clear from both the early experience of Aimhigher and the research in this area. Despite the challenges, learner progression can be most effectively addressed through sustained engagement with learners in a way that integrates this progression learning with their wider life and learning experiences.

The recognition that more sustained engagement was needed in order to maximise the effectiveness of Aimhigher and other widening participation initiatives was given voice by the Secretary of State for Innovation, Universities and Skills at the end of 2007.

*'Aimhigher partnerships, other widening participation schemes, universities and schools should work together to form deeper, longer term relationships which last for years rather than days. Relationships not based on projects that end, but based on shared aims and objectives. That build systems, processes and structures for success that lasts'*

**Denham (2007)**

This was in turn incorporated into the approach of Aimhigher partnerships through the Higher Education Progression Framework (Action on Access, 2008). This sought to “guide partnerships and institutions in moving beyond one-off widening participation interventions to a sequence of experiences for learners within a sustained and planned programme” (p.6). The Progression Matrix model that Phil Dent was continuing to develop in the Coventry and Warwickshire partnership was based on a similar critique, but went further and was developing faster than the Higher Education Progression Framework.

*‘Previously, providers assessed learner needs and communicated these with the Aimhigher partners based on predicted outcomes to HE. When we applied The Progression Matrix with providers, we presented it as a model for assessing learner need, identifying the resources which you had to meet those needs and to deliver long term progression outcomes as a result, within which there would be learners who could progress to HE and for whom HE might eventually turn out to be the right one’.*

**Phil Dent, Aimhigher Coventry and Warwickshire Director**

While the Higher Education Progression Framework identified a curriculum based approach to widening participation it retained a number of the key elements of Aimhigher, most notably targeting towards the disadvantaged and a strong focus on higher education. In practice this often made working with schools difficult as they were frequently reluctant to separate out particular sub-cohorts. The Aimhigher Coventry and Warwickshire partnership therefore continued to implement The Progression Matrix and saw a number of local learning organisations adopt the model enthusiastically. The Progression Matrix proved popular as it provided a model not just for achieving higher education outcomes but also as a means of assessing needs, developing provision, targeting support and supporting progression for a wide range of learners.

The Progression Matrix had been presented at Aimhigher conferences as early as 2005 and it had gathered interest and support from a range of other Aimhigher partnerships. By 2009 the West and Northamptonshire Aimhigher partnerships were considering how they could use it to underpin their future work. However the end of funding for Aimhigher was announced in November 2010 and it became clear that the future of widening participation was going to require new approaches. The Progression Matrix clearly offered something for this new environment as it was targeted at learning organisations, encouraging them to manage progression proactively and organise the available resources to deliver this. This focus on school centeredness and sustainability clearly chimes with the government’s push for school autonomy and call for the public sector to deliver more with less.

While Aimhigher will be missed by many schools, colleges, and other learning organisations, its demise has also created opportunities to refocus and re-conceptualise the approaches which organisations have taken.

The Progression Matrix offers a deceptively simple approach which can be applied in many different settings. However, the experience of Aimhigher Coventry and Warwickshire corroborated by the findings of this research suggests that where the approach is most effective it requires organisations that are willing to change and staff who are able to develop their skills as curriculum planners. The Progression Matrix comes out of a critique of “off the shelf” and “drop-in” approaches to progression and as such presents an approach which makes demands on learners, staff and learning organisations to develop a more bespoke approach.

*‘You sometimes need to be bold and go with a simple model. Not everyone is comfortable with this: we have had to work harder and have asked partners to work harder to make it fit in with their context, rather than give them a predefined programme. But it is better in the long term, it is a more sustainable model, because when the programme goes, their model doesn’t go with it.’*

**Phil Dent, Aimhigher Coventry and Warwickshire Director**

The rest of this research paper will explore the utility of The Progression Matrix for the future by setting out how it impacted on a series of learning organisations and helped them to develop their understanding of the nature of progression and how to best support the progression of learners.

### 2. The nature of progression

Academic discussions on of progression seek to explain how an individual moves through their life, learning and work and what kinds of interventions can impact on this. Stanley and Goodlad (2010), note that these theories typically explore individual decision making, social structure and the role of culture. Progression is therefore about the relationship between the individual and the world around them and in the context of this study a key question is how far learning organisations can influence this progression.

The term 'progression' is understood differently by different people. Within this report, the authors use the term progression to mean movement through a life journey which includes transitions between various stages of education and into meaningful work. The term is seen as sequential and developmental in nature. The term progression taken as an umbrella concept is complex and can be considered to have a number of subsets. McGivney (2002) identifies five types of progression:

- **Educational progression** comprises progression to further learning.
- **Economic progression** can include acquiring skills for employment, gaining or advancing in employment, or starting up a business.
- **Personal progression** can include increased confidence, autonomy, tolerance, motivation to learn, or raised aspirations.
- **Social progression** can include improved social interaction, civic participation, including undertaking voluntary work and community involvement.
- **Collective progression**, whereby groups of learners move on together to achieve collectively defined goals or create new local networks.

The authors' use of the term progression includes all of these sub-sets which are underpinned by the conceptual framework which is at the heart of The Progression Matrix.

Academic definitions are useful, but it is also important to understand how practitioners working in learning organisations understand this concept. Researchers asked participants in workshops to consider their definition of progression. In general participants described progression in broad terms, arguing strongly that it went beyond the learner's progression through their organisations towards the attainment of qualifications.

#### 2.1. Participants understanding of progression

The action research approach adopted in this study has allowed researchers to meet participants in a number of different settings. Common to all research interventions has been a discussion about the nature of progression. Individuals were asked to explain their understanding of the term. The following Tag Cloud (Figure 4) indicates the relative frequency of the words used in participants' definitions at The Progression Matrix action research project launch event (May 5th 2011).

As the tag cloud demonstrates there were a number of key themes which emerged from this part of the research. For many participants, the concept of progression related to a wider sense of movement and development through life. For this group, the notion that career and educational progression was difficult to separate from personal and life development was common. Thus definitions often referred to 'whatever comes next' rather than seeking to prescribe a particular type of progression outcome. Many stressed the relationship between career progression and the development of broader life skills and attributes.

*'It's the personal development of the individual in their job role through the building of self confidence in order to obtain a promotion and then to move on to higher level training through HE or specialist courses'.*

**Member of teaching staff, training provider**



A final theme which emerged was the role which progression support plays in improving the health and well being of individuals. For some participants the provision of support which helps individuals to progress to a condition of health and wellbeing was an entitlement; 'It's their right'. Participants noted that progression support 'benefits the individual' and 'gives young people confidence and happiness' (Participants, The Progression Matrix action research project launch May 5th 2011)

Important in all of the definitions provided by participants is the notion that progression is a positive movement with a range of outcomes all of which bring benefits to the individuals, their families, the local community and to the country. It is noticeable however that success within the education system is usually described in terms of the outcomes of academic assessment. As Phil Dent noted during the Swindon Progression Matrix information event (June 29th 2011),

*'We need to look at the whole individual within their context to make judgements about educational success. Not just about 'what we give you' but 'where we get you'.*

**Phil Dent, Aimhigher Coventry and Warwickshire Director**

The Progression Matrix approach argues that the different outcomes of progression can be organised under the ideas of learner aspiration, awareness and attainment. Where progression activities attend to all three of these different areas they are likely to be more successful and able to ensure that progression is realised and sustained.

**Question 6:** How do you define progression?

**Question 7:** What is the understanding of progression amongst your organisation's staff? How do they see it intersecting with their roles?

**Question 8:** How does the idea of progression relate to your organisation's vision, mission or culture?

### 2.2. How do learning organisations support progression?

The Progression Matrix is an approach which is designed to bring the idea of progression into the centre of a learning organisation's practice and thinking. It provides a conceptual framework which allows diverse progression interventions to be linked up and a coherent learner experience forged. However, it is clear that many learning organisations are already delivering a range of activities that are designed to support learner progression. This section provides a description of the wide ranging and often disconnected interventions which are currently offered by many learning organisations. The next section explores the way in which a culture of progression can be built using The Progression Matrix .

The idea of progression is a complex one and encompasses the whole of a learner's journey. From the perspective of a learning organisation, this includes:

- progression onto a programme;
- progression through a programme; and
- progression from a programme.

There is likely to be considerable cross over between the learning from one stage and the application of that learning in different areas. The following lists indicate the approaches that learning providers who participated in the project were doing before encountering The Progression Matrix.

### Progression onto programmes

Moving to a new learning organisation can be a challenging experience. Some learning organisations have actively tried to address this through a range of different strategies to engage learners and anticipate or address any potential difficulties. Approaches to supporting progression onto programmes include:

- gathering data about the needs of learners,
- organising visits to new premises, and/or meeting new staff; and
- sampling new activities and discussing the different approaches to learning , teaching and living in the new organisation.

### Progression within programmes

As well as attending to progression at the point of entry some learning organisations have also developed strategies to address transitions within their programmes. The strategies that have been developed include a range of curricula and extra-curricula support and frequently address both short and long term progression goals. So choices about subject options are at once about progression within the school and about longer term career aspirations. The idea of a broad based personal development programme can be useful in addressing this area and encouraging the development of skills and attitudes that support progression. Approaches to supporting progression within programmes include:

- careers education;
- personal, social, health and economic education;
- citizenship;
- learning reviews;
- careers interviews;
- option choice support;
- parents' evenings; and
- support from learning mentors

### Progression from programmes

Some learning organisations are developing approaches designed to support learners to locate their current learning and attainment within the context of long-term progression through life, learning and work. One way of managing aspiration in the context of transition is through the use of career portfolios or progress files. These can be either electronic or paper based and are used for goal or target setting and collecting, storing and presenting evidence of achievement, CV's or testimonials. Approaches to supporting progression from programmes include

- career portfolios;
- support with job search;
- support with approaches to recruitment and selection techniques such as CV writing and interview skills;
- exit interviews;
- work experience; and
- HE visits.

**Question 9:** What does your organisation do to identify and support the progression requirements of learners arriving on, moving through, and leaving your programmes?

**Question 10:** How do you measure the effectiveness of this support?

**Question 11:** How do your processes help learners develop a sense of their educational programmes as part of their longer term progression?

### 2.3. Bringing coherence to progression support

The research undertaken for this report suggests that most schools have a range of activities in place to support progression. However this provision often consists of a series of unconnected activities each seeking to address a different issue (transition, option choice, career etc). These activities are generally not conceived as being part of a progression strategy and can be less effective in communicating the relationship between different aspects of the progression journey. The conceptualisation of these activities as all contributing to "progression" can enable a learning organisation to both manage them more coherently, but also to maximise the inter-connectedness between those activities. The Progression Matrix provides a way to connect these and to bring them into the mainstream of the learning organisation's activities.

Examples emerged from the study which demonstrated that some organisations had begun to explore other processes which help bring coherence to these interventions and which help learners to integrate them and create individual meaning.

Such approaches include:

- individual education plans and transition plans for learners with special educational needs;
- education plans for looked after children;
- careers action plans; and
- portfolios and e-portfolios.

Although these processes provided evidence of a more coherent approach to progression in some organisations, many more expressed dissatisfaction with approaches which were seen as ad hoc and disconnected. Case study organisations had begun to search for approaches which allowed a more coordinated approach to integrating learner support with curriculum. The Progression Matrix therefore filled a gap and gave organisations a tool to manage this range of activities more strategically.

Moving to a more holistic approach however is often challenging and the next section explores the barriers and challenges which face organisations in moving to a more integrated approach to progression.

### 3. Re-orientating learning organisations around the concept of progression

Changes in the policy and funding context for education have already begun to act as a catalyst for change within learning organisations. In the context of schools the new Education Bill is likely to alter schools' duties in relation to the way they support young people's progression (Watts, 2011). Schools have also been accustomed to selecting activities from a range of support services (e.g. Connexions, Aimhigher, or education business partnerships) which met the needs of their organisation, yet many of these organisations are closing down or in a process of change. This climate of change poses some considerable challenges for learning organisations, but it also offers the opportunity for some critical thinking and re-orientation. Through the research project some organisations were encouraged to consider how they might use the concept of progression to re-orientate their organisational mission.

The desire to re-orientate learning organisations around the concept of progression has not just been driven by recent legislative and policy changes. Many learning organisations recognise the importance of progression in their mission statements, but also reported that these mission statements were not always carried through into organisational culture. The following case study demonstrates the aspiration of one school to import progression into the heart of its culture.

#### Case study example: 11-18 secondary school

What we really want to focus on is developing a unique culture within the school and local community to ensure that progression actually works and on establishing that culture at every stage so that, for example, our students are working in a way that ensures peers are supporting peers. We are looking to track the ethos of our school beyond our schools gates in ensuring progression. For example, year 9 students are sent to work with learners in feeder schools. We are looking at links between key stage 4 and sixth form students, and also into the community in terms of work placements and local services. This is about finding common ground in terms of ethos and culture.

However, the aspiration of building a progression culture is not always straightforward for learning organisations to implement. This section of the research paper will explore some of these challenges further and examine what approaches organisations took to overcome them.

Participants in the study frequently recognised that re-orientating learning organisations around the idea of progression was challenging. This issue of how to best achieve change was discussed at the Swindon Progression Matrix event (June 29th 2011) in depth. One delegate argued that learning organisations needed to "embrace a culture of aspiration" but also noted that this was "very complex". Delegates noted that focusing on progression was not just about changing the mission statement or even about changing the curriculum, but also about ensuring that a wide range of stakeholders in the organisations understand and accept the approach.

*'For this to work well there needs to be a carefully articulated school vision and school values. Staff, parents and learners need to sign up to this.'*

**Learning Provider, Swindon Local Authority**

In the case of engaging staff in developing learner progression, it may be that in addition to understanding the aim, they also feel that they need to develop new competences as well as a broader understanding of who potential allies might be in this process.

*'People [partners] need to understand their professional limitations. This requires good signposting [and referral] and CPD for teachers to ensure that advice and information is not based on self-interest or out of date information. The CPD will require specialist input.'*

**Learning Provider, Swindon Local Authority**

A teacher involved in one of the case studies argued that this development was not just a question of individual up-skilling, but rather required a more strategic approach to whole organisation development.

*'For The Progression Matrix to be embedded within the school it will require a sustained effort including a whole school workshop, and case studies'.*

**Teacher, 11-18 secondary school**

If organisations are able to address change processes together through this kind of 'whole organisation' approach it is possible that issues around referral, information exchange and role division can be addressed alongside the strategic development of the vision.

**Question 12:** What processes does your organisation have for the identification of continuing professional development needs of staff regarding progression support?

**Question 13:** How are staff supported to develop their competence in supporting progression both individually and collectively?

**Question 14:** How do you talk to learners about the idea of progression? What activities do you have to help them to make sense of this idea in the context of what they are doing?

**Question 15:** How do you communicate ideas about progression to parents and other stakeholders?

These issues around achieving a consistent approach are sharper still when you are dealing with internal and external partners. Having a common language and a unifying view of what constitutes effective progression support brings a level of consistency to young people's experiences Partnership approaches could therefore ensure that all key players including other partner learning organisations, employers, parents and carers provide consistent messages and approaches to achieve better outcomes for learners.

**Question 16:** What do your partners understand by the term progression?

**Question 17:** Is there a shared vision or partnership approach to progression support in your consortia or learning community?

**Question 18:** What processes and opportunities exist for sharing and developing good practice in progression support within your partnership or learning community?

### 3.1. Challenges for strategic development and partnership working

In the past many organisations have been driven to focus on attainment through the emphasis on examination success and league tables (DFE 2010 b). There is a growing understanding that focussing on progression can both support learners on their educational pathways and drive up overall attainment.

*'The IAG and support processes are regularly reviewed and evaluated using a range of approaches including surveys, progression data and achievement rates. The way progression is managed is key to success'.*

**Manager, Training provider**

Schools and colleges who work in consortia, learning communities, extended school clusters or wider partnerships have begun to explore a more coherent approach to providing progression support. Whilst the difficulties of common timetabling and the logistics of delivering programmes to groups of learners who come together from a number of different organisations has been a source of discussion and wide ranging plans,

members of partnerships are beginning to recognise the need to adopt common approaches which ensure learner focussed progression support. This also produces a number of challenges and organisations have identified a need for a common language and a framework to implement these changes.

Schools and colleges are at the centre of a complex hub of partnership activity which can go beyond the immediate partner learning organisations. Some organisations delivering work based learning or vocational programmes are increasingly relying on the cooperation and input from employers. Not all however understand or recognise the new qualifications framework and how learners' programmes fit in with their wider progression and life plans.

### 3.2. Challenges for management and staff

Most learning organisations have some elements of progression support in place however the study reveals that provision is often patchy and staff are not always aware of their roles and responsibilities.

*'The progression support part of the curriculum has not always been overt. The plan is to introduce The Progression Matrix as an ILP framework, however this will require whole school drive through the heads of Year'.*

**School manager, 11-18 secondary school**

In one college of FE, refocusing around the concept of progression has highlighted the relationship between various progression approaches and activities and the need to help staff to understand the relevance and importance of coherent approaches to progression as good practice. In doing this the college feels that it has raised awareness of staff roles in delivering progression outcomes and the critical relationship between attainment and progression. In a further case study organisation, a refocusing activity has helped staff to understand and improve their own contribution to progression support.

*'This has been helpful because in the past people's job boundaries have been a bit woolly but this has helped to develop an overview so that everyone understands their contribution'*

**Teacher, 11-19 secondary school**

### 3.3. Challenges for the learner

Young people who have been identified as having specific support needs are subject to a variety of planning approaches throughout their education. Some learners with multiple needs are often presented with a number of plans which when seen together may appear to lack coherence and purpose. Young people need a framework which helps them view education as a part of a longer term and often life-long process rather than an isolated series of interventions and planning processes.

*'Young people often can't see beyond the immediate but as they get older they begin to be able to make more long term plans and The Progression Matrix encourages this thought process'.*

**College manager, Multi-site college of further education**

## 4. The impact of an enhanced focus on progression

The Progression Matrix was introduced to a wide group of learning organisations through this action research project and has been used by many, through Aimhigher, for up to three years. Although the project was carried out over a relatively short period of time (four months) it has been possible to observe a number of organisational impacts in terms of strategy, management and outcomes for learners.

### 4.1. At a strategic level

Engaging with The Progression Matrix has helped learning organisations to re-define their overall approach to managing progression. Through engagement with The Progression Matrix organisations have been able to rethink their core mission and objective. This has been particularly timely as current changes to the policy and funding of the educational system have necessitated some rethinking of what activities are conceived of as core and peripheral. The Progression Matrix has provided a conceptual model that links a number existing activities and explores how they relate to the metrics around which learning organisations are judged. For some organisations, using The Progression Matrix has enabled them to re-think the way in which they use external resources to support learners in their development. While there are clearly advantages in being able to access expert external support, it can be costly and can sometimes result in poorly integrated activity which exists in a silo from the mainstream curriculum. One school articulated how The Progression Matrix had helped to address this.

*'The school admits to having accepted support in the past which was freely available without questioning the validity or effectiveness of such support. The Progression Matrix will help them [staff] focus resources where they will be most effective'.*

**Deputy Head Teacher, 11-18 secondary school**

The Progression Matrix therefore has the potential to empower learning organisations to make purposeful choices about externally offered provision. In the current climate of marketisation and increasing autonomy for learning organisations this is likely to be an important role when creating coherent programmes that enhances learners' progression.

#### **Case study example: 11-18 secondary school**

This school sees itself as a caring environment which aims to do its best for pupils in helping them fulfil their potential. The school leadership is fully behind this stance and there is a sense of excitement about putting these ideas to the learners and staff and seeing what differences can be made to provision and outcomes for learners. The Progression Matrix has helped the school to focus its approach to progression, to help clarify the understanding of staff and to address the challenges which emerge. One outcome of this has been the development of a more focussed and structured careers provision. The school regrets the changes in funding for external careers and IAG support both in terms of Connexions and Aimhigher but feels a sense of moral responsibility to fill the gaps in provision which will be left by the demise of these organisations. The Progression Matrix has helped the school to respond positively to these changes and to address weaknesses in their provision and move forward into the future.

The components of The Progression Matrix (aspiration, awareness and attainment) have given learning organisations an analytical framework within which to re-examine their provision. This has underlined the need to develop a programme of support to address all elements of the progression equation.

#### **Case study example: 11-18 secondary school**

A 'Careers Academy' is planned for next September which will target a named cohort of learners in the school from an early stage and will provide them with enhanced progression support on an ongoing basis such as through extra-curricula activities. The plan is to ensure that every student knows what the next career decision to be made will be. This will move career decision making from a series of one off, unconnected interventions such as KS4/GCSE option choice to a more ongoing process from year 7 onwards.

The school would like to pilot The Progression Matrix as a personal planning tool with this group of learners and see it as a key part of building a career action plan. In addition, it is planned to use The Progression Matrix to engage learners in the Careers Academy in identifying their own careers curriculum needs. These ideas will then be fed into the overall careers education planning process which will be designed and implemented by the school leaders. The Progression Matrix will also be used as an evaluation tool with this group.

### 4.2. At a management level

Learning organisations who participated in the pilot also found The Progression Matrix useful in reviewing how they managed their progression offer, integrated it with the curriculum, and supported staff to engage with the concept of progression. One important benefit that was felt from utilising The Progression Matrix was the development of a common language and common approach around progression. Organisations have found that using The Progression Matrix as a key way to talk about progression has improved communication with both internal and external partners.

*'[The Progression Matrix has been seen as] using a method that helps staff and assessors to "sing off the same song sheet" to help us all provide the same level of support'.*

**Delegate at The Progression Matrix action research project launch, May 5th 2011**

An equally important aspect of The Progression Matrix approach has been to underline the need for schools to work collaboratively with primary schools on aspiration in order to improve their key stage 4 attainment outcomes.

*'It makes clear in discussion with partner feeder schools, that raising aspiration at KS2 can affect attainment at KS3 and 4'*

**Learning Provider, Swindon Local Authority**

The use of The Progression Matrix has also helped learning organisations to embed new approaches to teaching and learning. A number of organisations in the study described how they had moved from a content focused and teacher led approach to a more interactive, learner led pedagogy as a result of tailoring teaching and learning to individual learner needs.

*'The approach to teaching and learning has changed as a result of The Progression Matrix. It is now more activity based and learner led. This sits well in the new language of education. There is a trend to move from 'teaching and learning' towards 'learning and teaching'. The Progression Matrix ensures that attainment is not harmed due to the emphasis on learner led provision'.*

**College manager, Multi-site FE college**

Many learning organisations noted that in recent years they had been driven to focus on attainment often to the detriment of other aspects of the educational experience. While attainment remains crucial, the recent move towards an increased accountability for schools regarding the successful, sustained transitions of their learners (DFE 2010) introduces a new driver into the picture. This is a message which is sometimes uncomfortable for staff, as they feel they have little control over learners' behaviours once they have moved on to a new destination. The Progression Matrix, however, has concentrated teachers' attention and provided a rationale for changing practices. Using The Progression Matrix provided organisations with both a tool and an approach to identify gaps in the provision of progression support. The result has been a more coherent approach to curriculum planning and development.

### Case study example: 11-18 secondary school

Members of school staff have been involved with The Progression Matrix project for two years. The school adopted The Progression Matrix in the first place because of its simplicity. The tool has been used in a number of ways and there are plans for further developments.

Initially The Progression Matrix was used to map the interventions which were taking place. This process identified gaps which existed. A second Progression Matrix was then used to plot what interventions could/should take place to furnish the gaps.

The initial mapping exercise considered the full range of interventions such as peer mentoring, Aimhigher Associate activities, partnership reading activities and university visits. The mapping also included an overview of both the careers and personal development curriculum however it was felt that this could have been undertaken in more depth.

The mapping exercise revealed that whilst aspiration was being addressed in general there was insufficient targeting of aspiration raising activity. The school realised that aspiration raising needed to start earlier in a learner's journey and that this also needs to include working with parents to dispel any misunderstandings about changes in funding as this was increasingly influencing the type of support learners were receiving from their parents for an HE progression route.

### 4.3. With learners

Organisations who had used The Progression Matrix reported a range of advantages and impacts for learners. The Progression Matrix has been used to support learners either by direct use of the tool in one to one or group settings or to develop bespoke responses on behalf of learners. Organisations using The Progression Matrix directly with learners noted that it could affect the way individuals viewed their long term aspirations and goals.

*'It can reduce the impulse of young people to opt for short term gain at the expense of long term achievement'.*

#### College manager, Multi-site college of further education

Case study institutions reflected on the fact that young people who are motivated to stay and learn are likely to be less challenging to engage and maintain on programmes of study.

*'This will bring a change in attitude because learners will become more aspirant. A big part is about teachers and staff working together with young people. I am hoping that it will raise standards of achievement. It will enhance their confidence and self esteem. By encouraging them to be more aspirant and by encouraging them to seek out and unlock their own inner potential and celebrate their own unique talents'.*

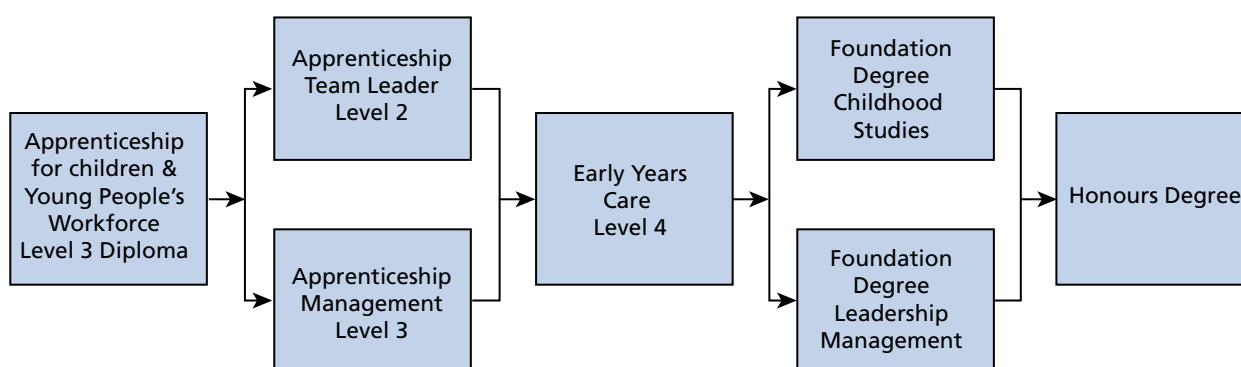
#### Head Teacher, 11-18 secondary school

The study revealed a specific instance of a training provider who used The Progression Matrix as a tool to support the induction process. This has encouraged staff in the organisation to have more in depth conversations about learners' motivations and aspirations. The document is seen as a portable tool which moves through the organisation and is further developed at stages throughout the learner's programme. Repeated use of The Progression Matrix reinforces strong messages about the purpose of learning and its place in an individual's overall career pathway.

**Case Study example: A training provider**

This training provider utilises a decision tree which maps a progression pathway for learners (see figure 5 below). This is used in discussion with individuals to help stimulate thinking about next steps and to contextualise learning from their programme into a more long term vision of their career. These discussions take place half way through induction in a 1:1 interview with a recruitment adviser during which the learner's aspirations are recorded using The Progression Matrix. This document is then used to review the learner's progress every 3 months. The Progression Matrix is seen as a living document. It does not necessarily get completed all in one go. It is seen as an accompaniment to the decision tree which focuses on qualification progression routes and specifically on attainment progression whereas The Progression Matrix provides the context. The Progression Matrix helps staff work through peoples' ideas without making assumptions. It is seen as being more 'in depth'.

**Figure 5: A decision tree for learners on an Early Years Progression Pathway**



**Early Years Care Progression Pathway**

Where organisations have used The Progression Matrix with partners there has been a similar benefit for learners. Where for example The Progression Matrix is used as a tool to share information about a learner's aspiration and awareness with an employer in the context of supporting a learner through an apprenticeship, it can ensure that a learner's aspirations and expectations are matched more closely to those of the employer and this in turn may result in an offer of permanent employment or further training.

*'Some young people have not been seen as HE material at school. However with a supportive and a forward thinking employer, anything is possible. The Progression Matrix can help to open their eyes'.*

**Manager, Training provider**

This would apply equally to the sharing of information between learning organisations however the effect here would be to ensure that learners were on the correct learning pathway appropriate to their chosen career and would support discussions about further progression.

The government is encouraging learners to become consumers of education through the introduction of student fees for HE programmes. Young people need to think about how they can achieve an educational outcome which represents value for money. Learners can no longer afford to be passive learners but rather

*'They need to be active. Actively involved in their aspiration. Making sure that what they are doing will meet their needs'.*

**Phil Dent, Aimhigher Coventry and Warwickshire Director**

### 5. Where next?

Organisations that participated in the study embraced the idea of progression as an organising concept. They also enthusiastically experimented with The Progression Matrix framework and tools and reported impacts from its use. The ways in which they used The Progression Matrix included as:

- a scheme of work;
- an overall strategy for learning;
- a curriculum plan;
- an assessment plan;
- an audit and mapping document;
- a discussion document with partners;
- a focus of individual discussions;
- an individual learning plan; and
- a framework for the Ofsted Self- evaluation framework (SEF).

Organisations found The Progression Matrix helpful in setting out an intuitive, but conceptually robust, understanding of a complex phenomenon. The availability of The Progression Matrix as a framework for developing and implementing progression support was widely welcomed and implemented by participating organisations. However the action research project took place over a relatively short period of time (4 months) and many of the impacts for the approach will not be seen until learning organisation have been through at least one full planning cycle. It is therefore useful to look forwards to see how The Progression Matrix approach might develop.

#### 5.1. Where next for The Progression Matrix?

Participating organisations worked with The Progression Matrix and were able to translate the framework into organisational policy and practice. However, a number of participants indicated that they would value further support materials and training. Amongst the suggestions were some practical ideas for support materials such as

- case studies,
- links to labour market information which would help staff to embed messages about progression into long term career plans,
- a proforma for an action plan to accompany The Progression Matrix
- questions which could be used with learners to help them complete the document
- appropriate curriculum activities which might help focus learners' minds on progression

A number of individuals expressed a hope that The Progression Matrix would be provided in a format which allowed organisations to personalise the tool both to their own requirements such as through the use of logos and to learner needs such as through the use of differentiated language. This would enhance the way schools were able to communicate the centrality of progression to the organisation's mission.

There was also some interest in whether The Progression Matrix could be used to inform the development of online tools or to integrate with existing tools that organisations used. It would, for example, be possible to develop an e-portfolio which was based around The Progression Matrix framework. Many learning organisations already had virtual learning environments such as Moodle and stressed that it was important that any future developments integrated with these.

### 5.2. Where next for learning organisations?

Throughout the study, participants underlined the need to embed the concept of progression within an institutional ethos and mission. This requires support from senior leaders and effort to embed the idea of progression across all management, teaching, learning and support activities. In participating institutions where senior leadership teams were not involved in the action research, the champions for The Progression Matrix frequently found that their impact was constrained. As has been argued in section 4, The Progression Matrix is a flexible tool that can be utilised at a range of levels from a single learner to a consortium of learning organisations. However, the most powerful impact on practice could be seen when a whole organisation approach was adopted.

Learning organisations that have engaged with The Progression Matrix have therefore found that they are committing to a process of change. Where this change is supported at a strategic level it is likely to move faster, but there are still actions to be taken to develop the organisation around the idea of progression. Participants identified the need to resource progression activity appropriately, to provide professional development opportunities for staff and to manage organisational understanding and processes in ways that support learner progression. The Progression Matrix provides a powerful tool that can support learning organisations in rethinking their approach, but it is not an instant solution. The reorientation of the organisation is likely to develop incrementally as a process of organisational engagement with The Progression Matrix.

### 5.3. Where next for policy makers?

This project has demonstrated that when an orientation towards progression is embedded within a learning organisation's strategic thinking, management, teaching, learning and support practices, the impact on learners can be positive. The Progression Matrix is a new approach which learning organisations can use to support progression. One of its strengths is that it offers a common lifelong approach that can facilitate transition between different learning organisations and between learning organisations and the world of work. However to realise the full potential of this approach there will need to be a culture shift and some co-ordination amongst the different elements of the education system. It is difficult, but not impossible, to imagine that this will happen without some attention to this issue in the policy sphere.

Policy makers may therefore wish to explore the potential for The Progression Matrix to organise policy in the key areas of learner transition, educational attainment, social mobility and careers. The Progression Matrix is rooted in an approach which places responsibility with learning organisations and recognises local expertise. It therefore aligns well with existing government policy in this area, but deepens the understanding of the problems that are faced by learning organisations.

**Question 19:** Could the existing policy framework be enhanced through a greater understanding of how learners progress?

### 6. Final words

This research paper has explored the principles, application and impact of The Progression Matrix in a range of educational settings. Through an action research project, learning organisations were provided with an opportunity to explore the concept of progression and The Progression Matrix approach. The project has found that this approach is both conceptually appealing and practical for learning organisations and that many have an appetite to continue to develop their practice using The Progression Matrix.

The action research project has encouraged organisations to revisit their understanding of the purpose of education and to engage with an analysis about how learners' progression can be achieved. Where this has worked best, organisations have sought to use The Progression Matrix to embed these ideas across their whole institutions. They have found that The Progression Matrix provides an intuitive approach which can simultaneously act on the learner journey, curriculum, learner support processes and organisational aims, objectives and processes.

Participants in the study frequently articulated that the education system in which they worked had become too focussed on attainment and identified that The Progression Matrix provided an alternative which was broader and chimed with their views of the purpose of education. The Progression Matrix has also empowered schools to link up existing learner support services, to relate them to the progression concept and to develop strategy and management approaches which embed the concept of progression. For learning organisations it is this strong connection between a conceptual model and a practical approach that makes The Progression Matrix effective.

Participants in the project repeatedly commented on the intuitive sense that The Progression Matrix approach made. The equation of *'aspiration+ awareness+ attainment = progression'* served as a conceptual framework around which teachers and other educational practitioners could re-orientate their practice. The Matrix itself then served as a flexible tool through which learning organisations could reorganise their provision. The action research project suggested that The Progression Matrix has considerable potential, and it seems likely that it will endure as an approach in those organisations that engaged with it through the project. In the current policy and funding environment where learning organisations are expected to become increasingly autonomous and to deliver enhanced learner destinations, it seems likely that The Progression Matrix will find an audience across a wide spectrum of the educational system.

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### 8. Appendix 1: Project approach

The action research project was undertaken to further develop an understanding of the principles, application and impact of The Progression Matrix. The short time scale allocated to the project (May-July 2011) introduced a number of issues for the project team and these are included to provide a rationale for actions taken.

In selecting organisations a number of considerations were made. The selection of organisations included some who had been using The Progression Matrix as part of their Aimhigher programme. This group was recruited because they offered the project a level of experience of implementing and delivering The Progression Matrix. Because the action research took place over a short timescale it was important to include this group as they offered a perspective on how The Progression Matrix could be sustained and mainstreamed as part of their provision.

In addition new providers were recruited to contribute to the project. This group provided an opportunity to engage with and track activity from the earliest stages of implementation. Initial engagement was through invitation to an action research launch event on May 5th 2011. The Aimhigher Partnership Directors and the Aimhigher Partnership Manager identified organisations for invitation.

The project began with a workshop delivered as part of The Progression Matrix action research project launch event (May 5th 2011). The workshop was delivered to both existing and new users and contained focused activities designed to meet the needs of both groups. Existing users of The Progression Matrix were asked to share their experience with new users as part of this process. This approach was crucial to giving participants enough time to learn about the model and how it might be relevant to their own particular practice, whilst being engaged in the ideas behind its development and in building a small community of practitioners.

Following the action research project launch, new institution leads were requested to apply The Progression Matrix to a programme of learning at their institution. The research team monitored and supported this process through a number of approaches. Early in the project a decision was taken to use an online blogging site (Posterous) to encourage the concept of a community of practice. Participants were encouraged to share their ideas and thinking about The Progression Matrix and to upload documents to share.

Organisations were also supported using email and telephone conversations. One complication at this stage of the project emerged when individuals who had not received any input about The Progression Matrix at the project action research project launch event expressed an interest in being involved in the project. The online Progression Matrix materials were not available at this point (although they became available towards the end of the project). This meant that one organisation was unable to participate fully in the action research. To some extent the availability of materials may have affected the final outcome of the project because participants had few reference materials to use. On the other hand, by not having a range of high quality support materials it forced organisations to be more creative and this may have enriched the findings of the research.

The project team also used opportunities which were presented throughout the project to explore the issues associated with progression support including a progression event in Swindon (June 29th 2011), and a meeting to report interim findings to stakeholders (July 13th 2011)

Towards the end of the application phase the research team visited institutions to meet those who were actively engaged in its application to complete a structured reflection process.

Data was collected throughout all aspects of the research including during The Progression Matrix action research launch event (May 11th 2011), at a Progression event in Swindon (June 29th 2011) and at the meeting which reported interim project findings (July 13th 2011). Data was then analysed thematically against the aims of the research.

Although the timescales for the project prohibited longitudinal investigation of impact the final report presents an initial view and presents a number of questions which can be used both by institutions and policy makers to develop their approaches to supporting progression and provide a framework for measuring the long term impact of The Progression Matrix.

### 9. Appendix 2: Detailed case studies

#### 9.1. An 11-18 school

This school is an 11-18 mixed comprehensive with a Sixth Form. The mission of this school is

*'To create a vibrant learning community, enabling all our students to strive towards achieving their 'personal best' and towards becoming positive global citizens of the future'.*

The school has embraced the use of The Progression Matrix as a means to achieving their vision and have applied it to a number of situations throughout the organisation.

Senior leaders recognise that managing progression has traditionally been poor in the school and has not always been overt. In the first instance, the organisation has used The Progression Matrix to map provision and identify gaps in progression support. This work has been undertaken by the school's Careers Coordinator with support from the senior management team and by undertaking the activity the profile of progression support has been raised across the whole organisation. The school has recently changed from a horizontal to a vertical tutoring system which has afforded more time for discussion between staff and learners particularly around issues of performance and progression. The school also monitors tracking data and notes careers aspiration.

The school has also undertaken a review of staff's current roles and responsibilities regarding progression. This has underpinned a renewed focus on progression throughout the school and ensured that a programme of professional development and support has been developed to support the re-focussing agenda.

The school provides a number of progression activities for learners across all key stages such as the 'opening minds' programme in year 8. This programme includes an overview of the school's exam process and helps learners understand the incremental and developmental nature of their education programme. Each year the pupils have an assembly which covers future options. Learners find this helpful as it helps them to 'know what happens in the future'. Learners also have careers lessons as part of a programme of citizenship education which occupies one lesson per week.

They have twice yearly reviews of educational progress which can involve parents at the learner's request. The discussion results in written objectives with step by step targets. This document is duplicated and the learners as well as the staff receive a copy for monitoring and follow up. In year 10 learners have the option of speaking to the careers and work-related learning co-ordinator. These interventions utilise information from other sources such as the educational progress review to develop the learner's concept of their future self, to raise their aspirations and agree targets to ensure that they achieve their career goals.

The Progression Matrix has been used as both a 1:1 individual planning tool with learners and as a way of having class discussions. The plan is to introduce The Progression Matrix as an ILP (Individual Learning Plan) framework, however it is recognised that this will require a whole school drive through the heads of year.

The school's Curriculum Guidance Forum (which includes representatives from all areas of student learning such as the SENCO, the pastoral deputy head, curriculum deputy head and members of the guidance team) meet every half term to discuss the impact of curriculum changes to groups of learners. The forum discusses and considers different pathways. The forum asks the question 'what is a learner's entitlement for support in achieving their pathway?' The Progression Matrix has been central in responding to this question

There has been some suggestion that The Progression Matrix could also be helpful in developing a Self Evaluation Framework for Ofsted.

### 9.2. A multi-site college of further education

This multi-site college of further education has been experimenting with The Progression Matrix in a number of ways. This work has been led by the higher education manager and supported by the work-related learning coordinator.

The Progression Matrix is seen as a simple but natural planning process which has been used to map existing activities and then to identify any gaps. Many people are already providing support which meets the components of The Progression Matrix, however, by undertaking mapping it has raised individuals' awareness of the concept of progression.

The Progression Matrix has been used as the basis for a scheme of work and as such has been simple to use and has affected the approach to teaching and learning which is now more activity based and learner led. There is a trend to move from 'teaching and learning' towards 'learning and teaching'. The Progression Matrix ensures that attainment is not harmed due to the emphasis on learner led provision.

Using the Progression Matrix has identified that staff have often emphasised their roles on attainment, while issues around aspiration and career awareness have been neglected. The Progression Matrix has allowed teaching and learning to be located within the wider personal development curriculum thus addressing the issues of aspiration and awareness. This has changed staff perceptions of their role and the power and impact of addressing aspiration and awareness in driving up attainment and achievement.

A further development has been the introduction of an assessment plan for learners taking apprenticeships which has been based on The Progression Matrix. This is also used in discussion with employers and thus its potential as an awareness raising approach is beginning to be embedded within work-based learning provision. It has helped employers, staff and learners to see things in the long term.

### 9.3. A training provider

This training provider is a leading provider of training and development, including business to business courses and Apprenticeships for young people and adults and is a large provider of courses in business and associated areas.

Staff at the organisation have embraced the use of The Progression Matrix as a means of supporting learners. Prior to the introduction of The Progression Matrix, the organisation had a number of processes in place to support learner progression. Interventions such as starter interviews and induction programmes, programmes of career learning, mentoring and support as well as help in moving on to the next destination all formed part of the organisation's approach. Staff readily admitted however that the introduction of The Progression Matrix had provided a new focus for progression, one which was based on learner need and a vision for their future rather than one based on attainment alone. The staff have used The Progression Matrix to engage in discussions with learners and have found this approach useful in helping learners to set their programmes into a more long term career plan rather than simply on a need to pass through one programme of study onto another with the chief goal being to gain an award. This approach helps their learners to 'aim high'.

Using The Progression Matrix to record learners' ideas is seen as an advantage of the system. This approach helps them to structure their thoughts. The Progression Matrix is used during induction and is seen as a living document. It does not get completed all in one go but is revisited throughout the programme to slowly develop a vision of the future.

The use of The Progression Matrix has influenced the provision of curriculum and enrichment activities. Where groups of learners consistently request certain programmes (through the use of The Progression Matrix) which are not currently available, staff have sought to fill these gaps in provision.

## Building a progression culture: Exploring learning organisations' use of The Progression Matrix

Staff at this training provider have also used The Progression Matrix in discussions about learner progress. This has facilitated a more holistic discussion and has helped both employers and trainers to understand how to motivate learners.



