

IAG Review Expert Practitioner Workshop

January 22nd - 23rd, 2007

Summary Report

Background and policy context for the workshop

The IAG Review

The cross-government review of IAG for adults has identified the need for a powerful new skills and careers service that would have the clear purpose of driving progression in learning, work and careers, through:

- universal access for all adults – with those who can help themselves being encouraged to do so and more resource intensive options targeted on specific groups such as benefit recipients, the low-skilled and others within the Skills Strategy priority groups;
- flexible delivery of services/no wrong door approach – access to an integrated, coherent service online, face-to-face, over the phone or through a combination of these;
- a standardised menu of services - with all options clearly described in jargon-free terms that customers can understand;
- access to a skills diagnostic – that would all help individuals take stock of their skills and act on opportunities to progress their careers as well as enable advisers to identify and support the specific skills development of the unemployed;
- ongoing support and follow-up – facilitated by a customer record and tracking system linked to the development of the Unique Learner Number;
- reformed 'on-programme' support – providing improved pre-learning skills assessment and help; expert on-programme input from tutors and advisers plus further advice at the end of a course to achieve outcomes and progression to further job or learning opportunities;
- clear links to employers and employer-facing support - making links to Train to Gain, Business Link and the work of ULRs to ensure effective workplace guidance.
- clear transition arrangements – between different levels of service, e.g. young people to adults.

The Leitch Review

The findings of the recently published Leitch Review of Skills also identified an Adult Careers Service with universal access to a skills diagnostic process (a 'Skills Health Check') as key elements of a wider strategy to promote and support adult skills development:

- A new Adults Careers Service [should be established] providing a universal source of labour-market focused and accessible careers advice, including a free Skills Health Check. People must be fully informed and impartially advised as how best to improve their skills based on the economic value attached to particular skills and changes

in the labour market and have access to the advice they need to improve their pay and job prospects.

- The new Adult Careers Service will be proactive – reaching out rather than waiting for people to come.
- Key features of the new service should be:
 - Accessibility. Advice delivered through multiple channels, including the internet and a phone line, at a time and location suited to the individual. Advisers will be conveniently co-located with employment services in town and city areas, as well as in the community, colleges and other locations.
 - Integrated delivery arrangements. To ensure quality and consistency in delivery arrangements, and effective access and referral between levels of service.
 - Effective screening. Everyone entitled to a free Skills Health Check to assess their skills needs. People should be able to access this by contacting the new careers service. Following on from this, advisers will ensure that people are advised on the most effective action, whether that is going on a course, doing work experience or learning at work, to tackle their needs and develop their career
 - The new adult careers service will be charged with raising aspiration and awareness of the importance and benefits of learning, particularly among those who have missed out in the past. The service will be directly responsible for raising participation in learning.

Purpose of the workshop

There is clear congruence between the findings of both the IAG and Leitch Reviews. As part of the continuing work of the IAG Review a workshop was organised to take these findings and begin to develop workable propositions for service delivery. While decisions about the exact nature and level of funding available for a new Adult Careers Service had yet to be made, the findings from the workshop would be used to inform future planning and development. The workshop brought together representatives from key partner and stakeholder groups to consider the potential purpose, nature and access arrangements for a Skills Health Check and a wider standardised menu of services for a new Adult Careers Service.

The workshop was held at Breadsall Priory Hotel, near Derby, on January 22nd and 23rd, 2007. Facilitated by the Centre for Guidance Studies, it was attended by 48 delegates representing key policy and delivery managers and expert practitioners from the sector, and representation from a range of other agencies with an important role to play in influencing and engaging with the new service – e.g. TUC, libraries and museums, the EOC and the ukonline network. A full delegate list is provided in the Annexes. This report presents a summary of the discussions that took place.

Developing skills-based diagnostics – defining breadth and range

Aim

1. To explore the breadth and range of skills that could be addressed in the development of skills diagnostic tools.
2. An initial breakdown of types of skills was provided, as follows:
 - Basic skills: where literacy (including IT literacy) language skills, and numeracy are not at a functional level.
 - Intermediate and higher level skills: vocational or academic skill levels identified formally through the qualifications framework – levels 2&3 intermediate skills; level 4 (and above) higher level skills.
 - Workplace vocational skills: vocationally specific skills acquired through the workplace.
 - Employability skills: the skills needs often raised by employers as being important – communication skills, working as part of a team, flexibility, problem solving, all of which are more likely to be based on experience than on formally accredited learning.
 - Back to work/re-entering the labour market/progressing in the labour market: the knowledge or skills required to re-enter or progress in the labour market, e.g. may involve level of job search/job application skills as well as current levels of literacy, numeracy, IT literacy and employability skills.
 - Generic career development skills: the ability of an individual to manage and develop their career progression through assessment of own areas of strengths and weaknesses; identification of goals and options; making decisions; taking action and achieving objectives.

Responses

3. While the above list was recognised as a useful starting point, participants had a number of changes and additions:
 - A *holistic approach* to skills identification should be used, to include skills acquired through voluntary work; parenting and other community or family-based activities and responsibilities.
 - The following should be added:

- *Foundation level skills¹)*
 - *Life management skills)*
 - *Language skills (to Basic Skills)*
 - *Self-awareness (to Back to Work)*
 - *Self-employed/entrepreneurial skills*
- *Back to work/re-entering the labour market/progressing in the labour market* should be changed to read:
 - *Back to work*: the knowledge or skills required to re-enter the labour market, e.g. may involve level of job search/job application skills as well as assessment across the other skills categories
 - *Progressing in the labour market*: the knowledge or skills required to progress in the labour market, e.g. may involve knowledge of labour market conditions and cross-sector transferable skills.

4. Responses to whether skills could be clustered resulted in the following breakdown and diagram which had majority support:

- **Career management.** This refers to the skills required to manage and develop your own career.
- **Personal effectiveness.** This includes generic skills that individuals may require in the workplace, ranging from basic skills to those such as communication, team working and problem-solving.
- **Vocational skills.** This refers to vocationally specific skills regardless of how they are acquired, as well as intermediate and higher level skills acquired through the formal qualifications route.

- The model below illustrates this. It also acknowledges the role of other interdependences that impact on an individual's skill levels, skill needs and potential to undertake change including the propensity of an individual to take action.

¹ The Qualifications and Curriculum Authority and the Learning and Skills Council are working together to establish a high-quality, coherent and personalised curriculum offer at Entry and level 1 for learners aged 14 and above. This provision is known as the Foundation Learning Tier. See www.qca.org.uk

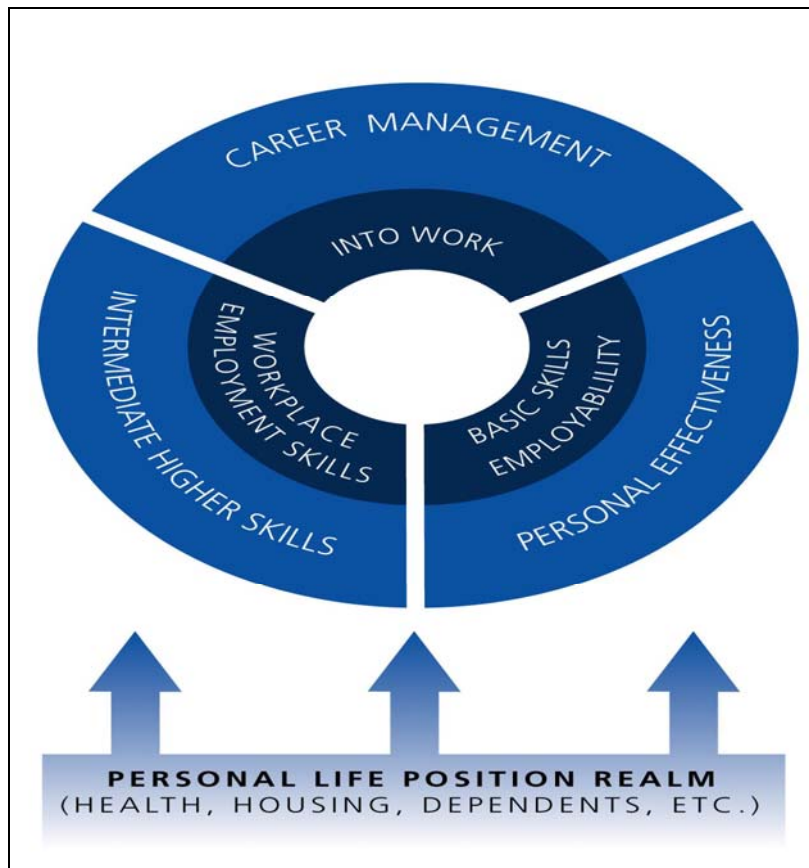


Diagram 1: Skills Clusters

NB: People may be at different levels in different sections at any one time. For example, a university graduate may have high level qualifications but lack career management skills.

General points

- **A personal skills portfolio:** A key purpose of a skills diagnostic activity might be the development of a *personal skills portfolio* reflecting the full range and level of skills held (note that work undertaken through Skills Coaching/Skills File/Skills Passport relates to this).
- **Assessing vocational skills:** Assessing vocational skills where no formal accreditation is available may require the involvement of industry specialists, especially where the aim is to identify skills (and subsets of skills) which may be transferable to other jobs.

Developing a Skills Health Check

Aim

5. To explore possible models for a *Skills Health Check*, in particular whether there could be:
 - one generic tool, or
 - a front-end initial diagnostic tool leading to a range of more specialist diagnostic activities.
6. To consider models which reflected the following essential criteria:
 - a *no wrong door* approach to access
 - flexible provision through multiple channels
 - how the complexity of individual skill needs would be addressed through the process
 - encouraging as many people as possible to ‘help themselves’
 - providing support to online activities, and
 - making best use of the existing infrastructure (e.g. ukonline access through libraries; vocational expertise available through colleges, work of SSCS).

Responses

7. The *Skills Health Check* was variously conceptualised as a front-end service, a signposting mechanism and a service reception desk. It was agreed, however, that the concept of *triage* should be applied to the *Skills Health Check* – i.e. an initial diagnostic front-end activity to determine exactly what type of specific support and/or assessment is required.
8. A number of issues or principles were agreed:
 - At the point of delivery there should be no attribution of priority to any particular set of skills. Users of the *Skills Health Check* should be able to set their own priorities and use the tool(s) to reflect their own individual and personal needs.
 - The *Skills Health Check* should include an initial assessment of need leading to a range of more specific skills assessments.
 - Individuals should be able to return to the range of tools available through the *Skills Health Check* as often as they choose.
9. It was noted that the *Skills Health Check* has a number of possible functions:
 - Signposting – gateway to a number of different services
 - Motivator – to access further services

- Record – of response to act as a baseline for tracking
 - MI (and feedback) – information from users to be included as part of planning for wider service provision, e.g. course provision.
10. Access to the initial diagnostic tool will need to be available through a range of settings, with signposting to more in-depth specialist assessments or other services:

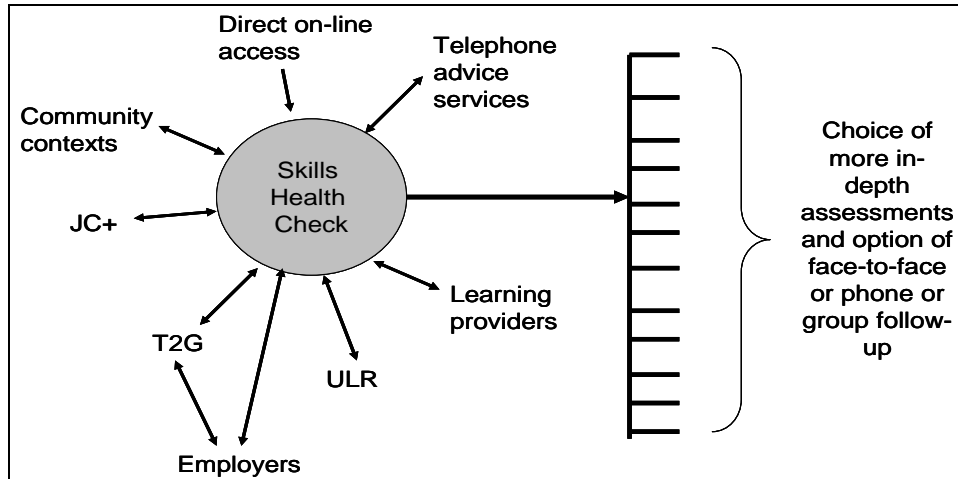


Diagram 2: Routes in, through and from the Skills Health Check

11. While it is proposed that an initial diagnostic activity should lead individuals to more in depth, specific assessments (with signposting and referral to mediated services as appropriate) a number of different elements were identified to the whole *Skills Health Check* process:
- One: an exploration of motivations including readiness for change / action
 - Two: further exploration of interests, skills and experiences and initial skills profile (e.g. up to 50 questions – not necessarily sequential)
 - Three: Reflecting back, i.e. these are the results, what do the results tell you and do you recognise and value the accuracy of the assessment? If yes... if no.....
 - Four: What next? Do you want to improve and/or to change? Where you can go next in relation to (i) key skills, (ii) vocational skills and (iii) personal management skills.
12. The health check must not leave people with a “so what?” feeling. Follow-up and follow-through is essential and should be clearly signposted – either self-directed or mediated (one-to-one, group, by telephone, e-mail etc).
13. Signposting clients to the *Skills Health Check*, onward progression after completing the initial diagnostic and referral within the whole process to mediated support are all critical to maximising the potential of the individual within the process.

14. An analogy was drawn with the 'assess/plan/implement/review' (APIR) model used by Connexions partnerships where initial assessment is only part of the process and its completion is through dialogue with an advisor and a number of activities. This model assesses the whole person and does not attempt to distinguish a person's work or learning from other factors about themselves and their situation.
15. The 'universal' access to the *Skills Health check* – a free service for everyone – would include access to any specialist assessments identified as well as the initial diagnostic activity. Also, 'universal' in this sense should mean multiple access as and when required, and not a 'one-off' activity.
16. How the *Skills Health Check* is marketed will be critical. Marketing approaches will need to reflect the different stages people are at in terms of their interest in, or readiness for, this type of activity. Marketing will also need to emphasise a positive, pro-active approach to skills development rather than a remedial one.
17. It is important that Government continues to provide targeted support to priority groups. If the goal of greater 'universal' involvement and engagement is to be achieved, however, this will need to be reflected in the way targets and outcomes are set for the future services.
18. While mediated support to the *Skills Health Check* will be available, the initial diagnostic tool(s) should be developed in online format with simple and clear language. There are existing good examples of this – e.g. DVLA renewing your tax disc online instructions; self-assessment tax on line offers a range of detailed self-assessment tools with a simple front-end menu; the Prospects website.

General points

- **Mediated support.** Taking online access as a starting point, on what basis would the need for mediated support be identified – (i) individuals choose; (ii) triggers embedded to help individuals decide whether they want mediation or not (iii) rationing access to specific diagnostic/assessment needs.
- **Links to industry specific advice:** How would this be achieved where a need is identified. Who would be involved?
- **Motivational support:** How can access to motivational support be provided, especially where initial access is 'online'?
- **Formats and languages:** The needs of the visually impaired and the deaf will need to be addressed. Also, access to formats in a range of community languages will need to be considered.

- **Skills Coaching:** There are some important lessons to be learned from the work undertaken through Skills Coaching/Skills File/Skills Passport.

Delivering a standardised menu

Aim

19. Based on the model presented as working proposition (see Annex A) identify:
 - The main access channels for the different menu items.
 - Which agencies should be involved in the delivery of the menu?
 - Where agencies with specialist skills or labour market knowledge may need to be involved?
 - (Working with case studies provided) identify how the individual case studies would move through the menu – what might their starting points be; how would they be referred between levels of services; how would ongoing support be provided?
 - Any issues around quality.

Responses

A summary of the responses to the task is provided below:

20. The menu currently implies a 'linear progression' rather than a process which individuals may engage with in an order of their choosing. Individuals must be able to decide their most appropriate 'starting point' and move around different elements of the menu according to their own needs. It will be important to be clear just how much of the menu can be accessed at one time; how many times individuals can return over what period of time and where there might be a cost involved.
21. The outcomes as currently stated may apply to more than one of the menu items. However, the way the menu is currently laid out links specific activities to specific outcomes.
22. The menu offer must be described in language that is clear, simple and client-friendly. Participants felt that there was more work to do on the current proposition in this respect.
23. Participants were concerned to ensure that providers of services (including private sector careers consultants working with individuals and employers and commercial recruitment and employment consultants) be encouraged to sign up to delivery of some (or all) of the menu items.
24. All elements of the menu must be delivered to the highest quality. The current arrangement to ensure the quality of the guidance offered by some sub-contractors in **nextstep** networks is giving cause for concern – not least by the **nextstep** contractors themselves. Important lessons need to be learned from this experience for the development of future services.

25. The menu will require high profile, segmented/targeted marketing. Consideration needs to be given to engaging with big names such as AOL and the BBC to promote the offer.
26. The issue of confidentiality in sharing information between providers also needs to be addressed, although this is undoubtedly being considered in the ongoing work around the ULN (Unique Learner Number).
27. All elements of the menu should be available through a variety of channels including, where appropriate and possible, peer or mentor support; organised group activities or drop-in workshops. It must be clear that individuals have a choice.
28. Decisions will need to be made about which elements of the menu require mediation (whether this be undertaken by phone, email, or face2face) and cannot be delivered purely online.
29. The standardised menu will need to be supported by up-to-date and relevant labour market information. Some decisions that individuals take will have to be based on an analysis of the cost implications and potential cost benefits. At present it is difficult to identify who would be responsible for providing this kind of information. Key agencies who should be involved are the SSCs, RDAs, RSPs and local LSCs as well as, at more specific operational level, FE colleges depending on the specific vocational curriculum offered.
30. The positioning of Learner Accounts in the new Adult Careers Service needs to be considered. Arrangements should be put in place to ensure that all adults taking up Learner Account have access to appropriate guidance (from the menu); on the other hand, Learner Accounts may help fund individual elements of the menu.
31. The examples of the websites provided by Careers Wales and the NWRDA are recommended as models for the Adult Careers Service site. Both provide general and specific information as well as signposting to the range of services available.

General points

- **Available provision:** There are increasing concerns about the accessibility of appropriate education and training provision for adults. Without accessible provision to refer individuals on to the work of the Adult Careers Service will be restricted.

Thought also needs to be given as to other types of 'provision' that could be provided for adults as a result of a guidance intervention – e.g. work experience; voluntary work; 'on the job' learning opportunities.

- **Embedded guidance:** Guidance activities embedded in the workplace (e.g. Train2Gain) and Further Education will need to be brought under the brand identity of the new Adult Careers Service.
- **Networking:** Effective networking across a range of providers to ensure currency of provision; signposting and referral; quality assurance and access to training and development and CPD activities will be an essential part of the proposed new service. How the national advice line provision can be integrated into networking activities needs to be explored (current arrangements increase rather than decrease divisions between the phone and face2face advisers) as does the issue of network co-ordination. For networks to be successful they require funding and commitment.
- **Quality:** Arrangements for quality across the whole of the existing (and future offer) is becoming an increasing concern to both practitioners and managers. In particular, the inherent difficulties within the **nextstep** sub-contracting arrangements of ensuring that all sub-contractors provide a high quality service (e.g. while a sub-contractor may have the **matrix** Standard there is no guarantee that a client will be seen by an accredited practitioner).

Also, the fact that some Train2 Gain providers have promised to 'achieve' the **matrix** Standard rather than have it at the moment appears to be a bending of the agreements.

A review of the existing quality arrangements with lessons learned for the quality arrangements of a future service will be essential.

- **Codes of Practice/Statements of Entitlement:** The new Adult Careers Service must have a universal Code of Practice to which all agencies will subscribe. This Code of Practice should be available on all marketing literature and the website.

There should also be a Statement of User Entitlement so that individual users can be clear on the type, level and quality of service they can expect and how long they might expect to wait for it (where mediated provision is required).

Other issues

Other observations made by workshop participants outside of main discussion themes were:

- The views of the FE and ACL sector have not been sufficiently represented through the work of the review; some services may be aware but generally they are 'doing their own thing' when it comes to adult guidance and need to be drawn into consultations about the quality, nature and delivery arrangements for a future service.

- Similarly, RSPs are undertaking a range of local planning activities, some of which involve IAG for young people and adults. There is a view that there is little awareness amongst the RSPs of the work of the review and the possible implications of that work for their own planning activities.
- Quality arrangements must address awareness, understanding and competence in dealing with people from diverse backgrounds; ensuring that all interventions (and tools) are free of bias and stereotyped assumptions. Anecdotal evidence (to EOC) suggests that this is currently patchy at best.
- Skills won't guarantee labour market success per se. Some groups will require changes in the labour market (e.g. flexible hours) and availability of other services (e.g. transport, childcare etc.).
- Marketing of the new Adults Careers Service will need to take place at a number of levels, i.e.
 - Individuals:
 - general/motivational
 - specific (skills/career development)
 - Intermediaries (individuals and services)
 - informing them of availability of the range of services and their potential role in supporting and signposting individuals
 - Specialist services:
 - informing those services involved in the delivery of the expectations and quality arrangements
 - Employers and services to employers:
 - informing employers and those individuals or services working with employers
- Brand identity will be essential. People need to know that once they see the 'brand' they will know what levels of service to expect and that they can be assured of its quality.
- Workshop discussions indicated that a number of new roles might be needed to deliver universal access to a *Skills Health Check* (and linked specialist assessment) and a standardised menu of services, i.e.
 - 'Skilled' advisers
 - 'Informed' advisers
 - Sector/occupational mentors (or sector/occupational champions; sector/vocational advisers; sector/vocational specialists) possibly to be identified through BLINKs, Chambers, SSCs, FE and employers.

- The funding of adult guidance activities is complex, e.g.
 - LSC funded services delivered nationally (currently **learnirect** advice services)
 - LSC funded services delivered regionally/locally (e.g. **nextstep**)
 - DWP funded services delivery regionally/locally (Jobcentre plus)
 - LSC funded services in the workplace (e.g. Train2Gain)
 - A range of other funders of guidance activities such as ESF, RDAs, RSPs, City initiatives, specific sector or area initiatives (e.g. London Olympics)

Greater co-ordination of available funding is required at both national and regional level.

Annex A: A standardised menu

MENU (Stated offer and outcome for individual)	SERVICE OFFER (Provider activities)	ACCESS CHANNELS Log in (LI); Walk in (WI); Face 2 Face (F2F); Phone in (PI); Group activities (GA)	AGENCIES/SERVICES INVOLVEMENT
1. Assessing need			
<i>Introductory services</i>	<i>Welcome and introduction Describing menu Identifying choice Cost charges Engaging with client Referring as appropriate</i>		
Skills Health Check Outcome: Skills Plan	Skills diagnostic; Interpreting results; Skills plan; Signposting or referral		e.g. jobcentre plus; learndirect <i>advice</i> ; nextstep providers; colleges/universities; libraries/ukonline centres; learndirect centres; (employment/learning focused) community-based provision; Union Learning Reps/workplace learning centres; independent sector career consultants (working with individuals or employers); private training providers; recruitment and outplacement services; HR professionals
2. Exploring options			
Exploring career options	Assessing needs & interests; Identifying options; Undertaking research; Making decisions;		

Outcome: Career Plan	Action planning.		
3. Taking action			
Course information Outcome: Information on possible courses, where and how to apply	Identifying request; Clarifying request; Identifying sources of info; Supporting understanding; Advising on course application procedures.		
Job search Outcome: Identification of job application techniques Job application plan	Identifying sources; Presenting approaches; Writing letters; Form filling; Interview techniques.		
CV writing Outcome: CV	Providing access to IT; Outline approaches; Hints and tips; Support to production.		
Support	Clarifying action; Supporting next steps; Offering ongoing support/making arrangements as appropriate. <i>Signposting and referral</i>		

	<i>Providing information for referral Supporting referral process</i>		
4. Following up			
Ongoing support	Follow-up to identify progress/evaluate success; Recording outcomes; Offering additional support; <i>Identify benefit of mentor/advocate. Make appropriate referral.</i>		
5. Additional activities			
Specialist services: Redundancy/outplacement counselling Sector-specific advice Pre-retirement advice Needs of specific groups: <i>(Please identify)</i>			

Annex B: Workshop Delegates

Keynote Speakers/ Facilitators

Name	Position, Organisation
Liz Bavidge	Chair, Fair Play Partnership
Antony Benson	nextstep Leicestershire
Simon Bysshe	Senior Associate, Centre for Guidance Studies
Paula Hardwick	Business Operations Manager, Ufi/learndirect Advice
Alexandra Hargreaves	Careers Coach, learndirect
Ruth Hawthorn	Senior Fellow, NICEC
Deirdre Hughes	Director, Research & Knowledge Transfer Unit University of Derby
Jo Hutchinson	Deputy Director – Research, Centre for Guidance Studies University of Derby
Heather Jackson	External policy adviser to the IAG Review
Tony Watts	Visiting Professor – Centre for Guidance Studies
Aled Williams	Senior Policy Officer, IAG Strategy Team DfES

Delegates

Name	Position, Organisation
Nick Bailey	Senior Policy Manager – Lifeline Learning, National LSC
Jenny Bimrose	Principal Research Fellow, Institute for Employment Research (IER) Warwick University
Marie Brett	Adult Services Manager, Connexions Tyne and Wear (nextstep)
Sue Claydon	IAG Partnership Manager, IAG nextstep Cambridgeshire
Amanda Duckett	Regional Manager Adult Guidance Services, VT Careers Management
Marian Emmett	nextstep Adviser, Connexions Cheshire and Warrington
Joe Fearnough	Unionlearn Equal Project Manager, Unionlearn with the TUC
Geoff Ford	Senior Consultant, The Age Employment Network
Andy Freeman	Chair of Adult Guidance Group, Institute of Career Guidance
Amy Gadd	Senior Regional Manager, Ufi/UK online Centres
Geraldine Glenister	Senior Policy Manager – OLASS, Learning and Skills Council
Steve Higginbotham	Chief Executive, IGEN Group Ltd
Debra Horn	Delivery Manager, Coventry Warwickshire Guidance

Natasha Innocent	Senior Policy Adviser Learning, Museums, Libraries and Archives Council
Carol Jamieson	Head of IAG, Manchester Solutions
Chris Jones	nextstep Contract Manager, nextstep Herefordshire and Worcestershire
Alison Kinder	Contracts and Development Manager, Careers West Yorkshire
Margot Kinloch-Sturt	Policy Adviser, Department for Work and Pensions
Ann Mason	Careers Project Manager, Skillset
Lou Mason	Business Manager – nextstep, Connexions Cornwall & Devon Ltd
Stephen McNair	Director of Centre for Research into the Older Workforce, NIACE
Bridget Newbery	Development Manager, Connexions West of England
Mo Osborne	nextstep Manager, Hertfordshire Careers Services / NAEGA
Martin Peel	IAG Manager, Suffolk IAG
Louise Proctor	Lifelong Learning Director, Learning and Skills Council
Vivienne Ravis	President, NAEGA
Lesley Robinson	Skills and Learning Policy Manager, Jobcentre Plus
Jackie Sadler	Consultant, CLLG
John Seymour	IAG Strategy Manager, DfES
Surekha Shah	Website and Information Officer, nextstep London North
Chris Shingler	Unit Manager, Norfolk Guidance Service
Jill Stevens	Directgov, DFES
Jill Valentine	Adviser Skills Manager, Ufi Ltd
Jenny Wallis	Department for Education and Skills
Madelaine Wisdom	Network Co-ordinator, nextstep London Central
Helen Wollaston	Director of Campaigns, Equal Opportunities Commission
Tricia Wray	Senior Manager, nextstep Leicestershire

Note Takers

Elizabeth Davies	Research Assistant, Centre for Guidance Studies University of Derby
Hayley Lamb	Researcher, Centre for Guidance Studies University of Derby

Organisers

Margaret Christopoulos	CPD Co-ordinator, Centre for Guidance Studies University of Derby
Samantha Marshment	Projects Contract Co-ordinator, Centre for Guidance Studies University of Derby