



LINCOLNSHIRE & RUTLAND

**EVALUATION OF THE
LINCOLNSHIRE CONNEXIONS PILOT**

REPORT 3: PERSONAL ADVISER TRAINING AND SUPPLY

Ted Daszkiewicz

Centre for
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PREFACE

The role of the Personal Adviser (PA) is a key feature within the new Connexions service. This pilot project provided an exciting opportunity for staff to consider how the role could be developed and to reflect on issues that require further development within the Lincolnshire and Rutland areas. As part of this process, I have received valuable advice and support from a broad range of individuals and organisations at a local and national level. The following individuals and organisations are thanked for their contributions: Leicestershire Careers & Guidance Services Ltd; Lincolnshire Youth Service; SOVA; CG Partnership; Lincolnshire Employment Service; Lincolnshire Social Services; Education Welfare; Lincolnshire Careers & Guidance Services Ltd; Nottingham Trent University; Huddersfield University; Include Training Advisory & Consultancy Services; Chris Bailey Associates; East Midlands Consortium; John Cooper Clarke Associates; Department for Education and Employment; Karina Vigler Consultants; Lucy Faithful Foundation and the Society of Emotional Intelligence.

Ted Daszkiewicz
Project Team Leader

EXECUTIVE SUMMARY

This report primarily focuses on research and findings related to the role of the personal adviser (PA) /mentor, the selection of personal advisers including issues related to widening access, and the recruitment of potential PAs from 'non-traditional' backgrounds.

Section 1 introduces the project and the rationale behind choosing three main themes for development. The aims and project milestones are also presented. From the outset, priority was given to identifying the parameters and contents of a suitable job description for Personal Advisers and identifying how recruitment, selection and training could be developed to meet the needs of the new Connexions service.

Section 2 outlines the methodology and range of approaches used to consult with personal advisers, employers and young people. It describes the difficulties experienced at the beginning of the project in terms of identifying a variety of organisations that could contribute to the development work and describes how these problems were overcome.

Section 3 discusses the main findings which show that the PA job description and the knowledge skills and attitudes required to do the work show a highly complex role. Within the selection process of potential PAs, three major areas were developed. An excellent training course has provided the foundation to develop criteria to aid in the prevention of recruiting paedophiles to the service. A practice, policy and procedures framework will be developed to cover recruitment, selection, monitoring and supervision. An emotional intelligence test is being developed which will look at 'screening out' potentially unsuitable applicants/PAs. This will also help in the selection of students onto any access course. Eight emotional traits being looked at which include awareness, openness, respect, empathy etc and will assess a persons attitudes in a variety of settings. A computer based critical incidents tool to aid selection (CAST) is near to completion. This involves potential PAs responding to a variety of critical incidents and the replies being analysed by young people to assist in the selection process. Young people were also involved in the design of the tool.

Section 5 provides an analysis of recruitment patterns to the potential PA role in the East Midlands Career Services over the last 2 years has shown that the majority of staff and students recruited were white females with either 'A' level/Graduate qualification, aged between 25–45. These findings were the basis to provide evidence that an 'access' course was required to widen the recruitment band. Two different approaches, one of 6 months duration and one of twelve, have been put forward for approval. A partnership group consisting of Lincolnshire Careers, Nottingham Trent University, Huddersfield University and Includere were involved in the planning. A curriculum has also been put together. The proposals are awaiting approval from DfEE.

Sections 6 & 7 highlights the key lessons learned and makes a series of recommendations to inform the future development of PA recruitment, selection and training at a local and national level.

1. INTRODUCTION

1.1 The project was carried out in the light of Connexions Pilot funding to develop:

- various approaches to defining the role of a PA.
- new approaches to PA selection.
- widening access and to instigate a new access course.

1.2 The course would encourage people with the right attitudes, potential skills and knowledge, but without the relevant qualifications, to become PAs.

1.3 The rationale behind choosing the above themes as a focus for development were as follows:

- (a) The need to have a clear and defined job description for a Personal Adviser. This is of paramount importance to be able to progress with the Connexions Service.
- (b) A selection process that ensures that PAs are recruited in a manner that will improve current procedures. This will mean that in the end, all young people will have a PA who can help raise their aspirations and assist in removing barriers to learning.
- (c) Young people should have some involvement in the selection process.
- (d) The importance of widening access in order to meet the necessary increase in PA numbers. There is a need to try and encourage people to enter the profession who have previously been overlooked, not considered themselves suitable or been unaware of the opportunities. This could have been due to issues such as lack of qualifications, lack of time to study on a full-time course, lack of appropriate local training providers, being a single parent or carer etc. Many people may have the necessary attitudes, outlook and potential to succeed with young people but due to a variety of reasons have not pursued their potential.
- (e) The need to develop a local access course to suit the availability times of potential PAs as well as allowing them to develop the knowledge and skills required to do the job.
- (f) In the past, potential recruits to a variety of caring professions have been lost due to a lack of local centres able to provide training. This together with inflexible times and courses unable to fit in with their normal daily demands, have precluded many people entering careers.

1.4 The aim of the project was to:

'Develop approaches to the delivery of Connexions through a network of trained PAs and mentors.' (Pilot Project Development Plan, 2000)

Project milestones:

- Establish a multi-agency project team.
- Develop selection and recruitment processes for PAs and mentors.
- Develop in partnership with Nottingham Trent University an accredited Access Training course.
- Establish in partnership with Nottingham Trent University and colleagues in the East Midlands, a delivery structure for the accredited training of Connexions staff.
- Develop an integrated management structure for PAs working in schools.
- Define the role of PAs working in schools.
- Design and implement a selection and recruitment process for PAs working in schools.
- Develop and provide training to complement that which will be part of the national programme for PAs.

2. METHODOLOGY

- 2.1 The initial approach investigated using as many people as possible from partner organisations to be involved in the project team. Difficulties were experienced in terms of assembling a relevant management group due to the timescale and requirement to develop the work within a multi-agency approach. However, a highly successful practitioner day was held and this attracted a variety of partner organisation who were interested to develop the PA job description and consider ways in which partner organisations could increase awareness of their respective roles. In essence, the project leader adopted a consultancy approach whereby individuals and organisations were contacted and involved in meetings/consultation events throughout the project.
- 2.2 At each stage of the individual partner organisations were consulted on progress as well as next steps.
- 2.3 A wide range of consultation approaches were used including meetings, professional development days, individual interviews, various conferences including a young persons conference, questionnaires, analysis of critical incidents, factor analysis and working groups. These varieties of approaches proved successful given it enabled relevant organisations to contribute as and when appropriate.

3. FINDINGS

Management & Planning

- 3.1 Overall the project tasks became a lot more difficult than initially envisaged. From the outset, it was clear that time constraints were the main challenge. Having been recruited to start the project in late August, it only left seven months to concentrate on the many project tasks. This became even more apparent when a lot of time was spent analysing what was currently available. Additionally, findings from initial research showed that there were very few suitable products available and time was going to be required to modify existing materials.
- 3.2 As the project developed, many of the initial tasks and initiatives had to be modified in the light of findings, feasibility and usefulness. For instance there were very limited appropriate instruments available to support the selection of PAs therefore, it would be necessary to design new ones. This took time to plan, design, measure validity

and reliability, construct, test and modify. Nonetheless, a strategy was devised and plans made to take this forward.

- 3.3 It was noted that some of the original tasks could be addressed by other pilots for example Project 7 - Developing a School based Connexions service therefore close working links were established to ensure synergy and cohesion.
- 3.4 Some of the objectives were difficult to achieve because they related to National Standards and other projects that were still ongoing i.e. implementing a delivery structure for the accredited training of Connexions staff. As a result of this, it became clear that a flexible approach would be required to enable us to take into account national developments as they unfolded. Budget and resources for some development areas were restrictive, i.e. the cost of developing new instruments/tools was far more expensive than initially envisaged. Much of the budgeting was linked to existing materials or products that were not appropriate. The pilot showed that producing something new is very costly.
- 3.5 Our findings indicated that developing an accredited access training course, recruiting students, and piloting a delivery programme would take longer than twelve days and £20,000 (See Appendix 9). However, a percentage of the money was used on development costs utilising the expertise of staff from Nottingham Trent University, Huddersfield University, Include and Lincolnshire Careers & Guidance Services Ltd. This proved an effective partnership to put forward a development proposal to DfEE that is currently being reviewed. As a result of this, the project needs to be extended to complete the full development of initiatives. Overall, management and planning is constantly being reviewed and changed in the light of progress.

Multi-Agency Work

- 3.6 In some cases, this area was difficult to get off the ground because of time commitments from various partner organisations. However, there were some highly effective events and work carried out when organisations were able to join together. Initially some of the difficulties emerged from the fact that a lot of staff from the various organisations were unclear about the Connexions concept and many could not see any impact on their day to day work. It became clear that there was a lack of information on how their own service would link into Connexions.
- 3.7 Some time commitments, which had been given by the Youth Service, could not be honoured due to internal constraints and pressures as well as staff being involved in other Connexions Pilot projects. It also proved difficult trying to get a range of organisations together at the same time. The original proposed project team of around nine people eventually became two. However, a group of five participants ranging from the voluntary sector, social services and schools had agreed to form part of a less time demanding focus group.
- 3.8 Agencies were generally helpful in allowing staff to attend various events and many offered to contribute directly to individual projects. A one-day conference was held involving delegates from a broad range of 'youth support' organisations with a specific remit to develop the role of the PA. This included:
- An explanation of Connexions and how organisations could potentially 'fit into' or 'relate' to the new service.
 - A mapping exercise to look at various PA tasks and roles.

- An analysis of current recruitment practice.
- A review of various case studies/critical incidents including an analysis of the client needs. This gave each delegate an idea of how other services worked with young people as well as their respective priorities and strategies.
- A sharing of ideas linked into the knowledge, skills and attitudes required for a PA.

The evaluation feedback showed that participants felt enlightened about each other's role(s) and felt 'more respect' for the various services. Various misconceptions were addressed and the process enabled a breaking down of 'barriers' between individuals and organisations.

Relevance to National Development

- 3.9 The development of a comprehensive job profile should provide a lot of information on the potential tasks of a Connexions Personal Adviser. It will also give a clear guide as to the knowledge, skills and attitudes required to be a Personal Adviser. A less detailed description also provides the key duties.
- 3.10 A job description for a 'mentor' can also be used to help recruit learning mentors, provide guidelines for potential volunteer workers, or could act as the basis for an assistant PA or even a student PA.
- 3.11 Once fully developed, the selection tools being currently constructed will hopefully prove a worthwhile addition to the selection process for any Connexions Service.
- 3.12 The development of a rigorous scrutiny process to reduce the potential for recruiting a person with unknown latent paedophilia tendencies is in the process of being carried out. This should provide helpful advice and guidelines in recruitment, selection, monitoring and supervision procedures of PAs for all Connexions Services. This will be essential given that PAs will be in contact with young people, especially the vulnerable on an on-going basis.
- 3.13 The Connexions Service National Unit (CSNU) has encouraged services to undertake some baseline work on identifying types of staff being recruited, which is likely to show the need to widen access. They are also investigating proposals for a two tiered access course which could help local people and other Connexions Service areas in the recruitment of non-traditional entrants to the profession.

Development of the PA Job Description

- 3.14 The pilot has produced a detailed and comprehensive job description covering over 130 potential tasks grouped under the 8 key Connexions principles and professional / ethical practice. There are also over 50 key knowledge, skills and attitude requirements. The document provides a comprehensive breakdown of the PA role and could be used in many ways to design training; identify training needs; devise smaller / key job descriptions; give a greater identify as to the role of a PA; and be used in determining pay scales. In addition, a document outlining the role of a mentor has also been produced which could be used in a variety of settings such as learning mentors, trainee PAs; and developing an access course. (refer to Appendices 1-5)

Process

3.15 The following process was used to produce the final job description:

- Brainstorming the potential role of the PA
- Acquiring evidence from other sources; Karina Vigler Consultants, other pilot Connexions job descriptions
- Gaining details of partner organisation and related professions job descriptions including Social Services, EWO, Health, and Probation etc
- Arranging a conference to look at the tasks and getting approval / additional tasks from a wide source of professions (refer to Appendix 1)
- Getting delegates to add to the knowledge, skills and attitudes through working on critical incidents
- Factor analysis carried out by various staff to detail what were perceived as being the key tasks for the role. Comprehensive job description prepared together with a framework detailing the key tasks (refer to Appendix 2)

Usage to Date

3.16 The documents have been requested by and sent to various organisations including DfEE, NTU, Include, other pilot Connexions Services, other Careers Services and Lincolnshire TEC. The work has also been used to help produce a job description for Connexions Lincolnshire & Rutland Ltd. The documents have been used to assist consultants in putting together an overall description for a PA for publication in Occupations 2002.

Selection Tools and Systems

Prevention of Latent Paedophiles Entering the Role of PA

3.17 In November the Connexions Service National Unit contacted the project to see if we could include some way of trying to prevent paedophiles from becoming PAs. This was a tall order as many organisations in the past have tried to address this with varying levels of success. After discussion with Social Services and other relevant organisations, a contact was established at the Lucy Faithful Foundation who have been involved in this work for many years. This eventually led to a course being put on for all senior staff who will be involved in the selection of staff. However, due to the popularity of the Lucy Faithful Foundation the earliest date that was managed for a course was 28 March 2001. Initial evaluation has shown the course to have been incredibly interesting and thought provoking with many ideas, suggestions and techniques given which will need to be incorporated into various working practices. Some key points to come out included the following:

- 1) follow the Warner report recommendations 1-10 and 12-24 on recruitment and staff selection;
- 2) create an awareness culture to include

- *Activities* – allocation of work, client relationships, working practices
- *Attitudes*

- *Environment* where young people can disclose

- *Environment* where staff can share concerns;

3) Supervision, staff support and information sharing systems

4) Anti-oppressive environment

5) Policies and procedures

Other points to emerge included; trying to put initial applicants off with the design of the advert, checking gaps in curriculum vitae, name changes, how to design forms, letting people know that the organisation constantly monitors and has supervision systems for staff and design interview questions to be used effectively.

3.18 As a result of our findings a development plan has been devised as follows:

- Initial evaluation of current practice (April 2001).
- Progress needed to put ideas and principles into practice (April/May 2001).
- Formal documentation covering principles and procedures of practice to be drawn up (May/June 2001).
- Further consultation groups to develop the practice to also include monitoring and supervision systems (May/June 2001)
- Principles to be put into working practice and findings sent to DfEE (July 2001)

Emotional Intelligence Screening Tool (EI)

3.19 The development of this tool was started due to not being able to find a suitable test on the market that could specifically measure the attitudes required for a PA. The measure will be at its most useful when initially trying to detect people wanting to become PAs who may not possess the right attitudes or attributes. This could also highlight that people may also not be aware of the attitudes required. Profiling could be done either on candidates wanting to join directly or those entering via an access course. A spin-off could be that the tool be used to detect 'a training need in current PAs'.

3.20 The tool will try and identify eight emotional intelligence (EI) constructs in the following areas;

- self awareness;
- awareness of others;
- self management;
- management of others.

The EI constructs will be openness, commitment, accurate self-assessment, resilience, goal focus, flexibility, respect/acceptance, and empathy. There is a clear rationale for each of the constructs and their definition. The format of the measure is on the basis of four statement choice cards, 'most like you' and 'least like you'.

3.21 The measure is in development and will need to have some profiling work carried out as well as other statistical measures of validity and reliability before being put into operation. A development plan has been devised as follows:

- Further work needs to be done on putting the constructs together. (April 2001)
- The measure needs to be trialed on existing PAs to develop profiles. (May 2001)
- Reliability and validity data needs to be produced. (May 2001)
- Tool to be finalised and trialed on potential PAs. (May/June 2001)
- Tool to be trialed on prospective access course students. (July 2001)

Connexions Adviser Selection Tool (CAST)

3.22 One of the aspects of the project was to somehow gain the involvement of young people in the selection process. After much deliberating and desk research on work previously carried out in this area, the following conclusions were formed.

- Involving young people directly on an interviewing panel could prove disastrous. The interview is a sophisticated approach and young people need to be given a lot of training and experience. Young people feel very nervous. Some cases where young people have been used in an interview setting have led to employers being successfully sued for young people being ill prepared in the process.
- If a candidate is being observed presenting to young people, is it really fair to subject them to a possible six presentations/group works in a day? Would they have fatigue by number six and give a biased assessment?
 - Young people need to have their views heard but in a less invasive manner.

This led to the idea of getting young people to comment on how a PA may react to a certain critical situation/event and the type of advice they may give.

3.23 A computer programme was devised to address the situation. A series of critical incidents were developed to cover a variety of situations that could occur in various PA roles. These were actual incidents that had occurred in a variety of work settings involving staff from the Connexions organisations. Questions/Cases were then framed into suitable young persons language (age 10/11). The incidents were then tested out on a group of young people (varying ability levels) at a Connexions young persons conference in Rutland. Incidents were analysed on a number of points including understanding, suitability and relevance. Young people were also asked to add any real life situations they or their friends may have been involved in. Incidents were then selected and added to the overall data banks.

How it Works

3.24 Refer to Appendix for full details. The following provides a brief summary:

- 1) A number of scenarios/critical incidents are selected related to the type of PA role. These are displayed on a computer monitor.
- 2) Questions are answered by candidates.
- 3) Responses are judged by young people on a variety of levels e.g. did you understand the answer, did you feel the young person was helped.
- 4) A computer print out is produced having pooled all the data together from the young persons judgements on how the candidate responded to each scenario. This is then used by the interview panel to help in the selection process for the job.

Responses can be analysed to give details of candidates ability to communicate at a young persons level; their ability to impress a young person; the need to be aware of the implications of their role and the balance between exactly what a young person may want and the reality of what can be provided. The interview panel can also assess the candidates responses. At the moment the prototype is at the third development stage and should be ready to use by mid-April 2001. Areas for further development include:

- Train a team of young people in assessing responses (Mid-April 2001)
- Use the tool in the first tranche of PA selection for Connexions Lincolnshire & Rutland Ltd (Mid-April 2001)
- Evaluate tool and the findings (May 2001)
- Incorporate any modification (June 2001)
- Make the programme more user friendly i.e. addition of colours and various other options (June 2001)

Widening Access & Access Course

3.25 A baseline study was carried out of all the careers services in the East Midlands, including Nottingham Trent University (NTU), covering recruitment patterns over the last two years to ascertain what was the 'make-up' of people being recruited (refer to Appendix 8). The main points from the exercise showed:

- No recruitment below 20 years of age (to technician or professional level)
- Adviser level, 85% of staff are graduate.
- Technician level, 42.5% graduate level and 85% had qualifications equivalent to 'A' levels or above.
- Only 7.5% of recruits at technician level were from ethnic minorities.
- Adviser level 64% female – 36% male.
- Technician level 85% female – 15% male.
- Overall profile for recruitment was: white female, well educated, aged between 25-45.

3.26 The findings highlighted the need to address a variety of issues and to try and broaden/widen access. A further study should be completed to try and discover the reasons for the above findings.

Access Course

- 3.27 The pilot investigated a range of issues relating to the provision of an Access course. It became clear that to provide a fully accredited access course, this would require far more than £20,000 to develop, accredit, put in place, find appropriate venues, staff and recruit students. Other organisations were also investigating this therefore it was decided to use the expertise of NTU, Inlude and Huddersfield University to combine and prepare a proposal.
- 3.28 The key principles underpinning the development of an Access course were:
- Allowing time to study at home as well as in the classroom
 - Student-centred
 - Sufficiently flexible with different times i.e. afternoon and evenings to suit different groups.
 - Locally delivered.
 - Must not separate the individual's experience from that of their community.
 - Based in local community venues.
 - Must emphasise the development and acquisition of certain core skills.
 - Work experience period(s).
 - Must encourage self-confidence and the concept of the independent learner.
 - Varying levels of experience and ability catered for.
 - Guarantee of an interview with a Connexions Service on completion of the course.
- 3.29 Desk research was then carried out which had the following aims and objectives:

Aims

- Investigate the processes involved in the development, validation and accreditation of Access courses;
- Determine the necessary key features of an Access course for the Diploma for Personal Advisers (Connexions), such as appropriate content, structure and method of delivery;
- Ensure the quality of the model Access programme by investigating best practice in Access course provision.

Objectives

These were achieved by:

- *conducting an Internet search* for information on Access courses. This focused on quality assurance guidelines and research into good practice as well as more general background information;
- *speaking with key people and organisations* involved in the development and validation of Access courses;
- *conducting a survey* of current Access course provision in England and Wales, with particular emphasis on courses most relevant to the Personal Adviser role;
- *establishing the key elements of the Personal Adviser role* and the Diploma programme to determine the needs of Access course learners;
- *investigating possible alternative methods* of Access course delivery such as mentoring and supported apprenticeships.

There is now a field research proposal designed to gain the views of other relevant groups (refer to Appendix 9).

- 3.30 A course proposal is in place which allows for a six-month course for people with the capability and who have had experience in Connexions related work. A twelve-month course for those with no experience and/or poor qualifications will also be available. The pilot proposals are currently with DfEE.

4. Conclusions

- 4.1 Some of the key learning points emerging from the pilot project designed to inform local and national plans include:
- a) The need to have some awareness raising conferences for all potential partner organisations at management as well as professionals working with clients, to inform them about Connexions.
 - b) Do not assume that management from the various services automatically pass down information to their staff. The need for effective communication channels.
 - c) More research needs to be carried out before finalising tasks, milestones and project objectives.
 - d) Key staff should be invited to, 'pilot' information raising awareness days and be asked if they would like to be involved in any of the projects as well as inviting them to make any additions/changes to proposals.
 - e) Be wary of taking on tasks/objectives that may be highly influenced by national strategy that has yet to be finalised.
 - f) Be aware that consultancy costs can be very high.
 - g) The process of designing a new course and gaining accreditation for it can prove very time intensive and protracted.
 - h) Certain progress may be influenced by decisions from DfEE, allowances for this need to be made.

5. RECOMMENDATIONS

- 5.1 The PA job description could be utilised by DfEE to link into a nationally acceptable description of the role.
- 5.2 A further study to be carried out to assess why certain groups of people do not apply to Connexions related professions.
- 5.3 A promotion drive to be carried out to promote Connexions jobs to non-traditional backgrounds.
- 5.4 The need for DfEE approval to go ahead with the access course in order to give opportunities for previous non-applicants to enter the profession.
- 5.5 CAST to be developed and then assessed by DfEE for suitability for use in selecting PAs by other Connexions Services.
- 5.6 The Emotional Intelligence tool has the potential to be an excellent aid to selection and identifying areas of staff development. Further trialling and statistical analysis should be undertaken.
- 5.7 The findings from the paedophilia course need developing and putting into a practice, policies and procedure manual. This needs to cover areas like recruitment, selection, monitoring and supervision.