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quality standard for information advice and guidance services

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People, professions and resources

Quality standards for Information, advice and guidance services

A review of the literature

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1 Acknowledgements

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2 The purpose of this review

This literature review is part of a review of the UK's **matrix** Standard, which is led by an Executive Group chaired by Dr Deidre Hughes OBE and supported by the Growth Company, which administers the **matrix** Standard on behalf of the Department for Education.

The purpose and scope of the literature review is to identify the key features of good quality Information, Advice and Guidance (IAG), so that these can be considered as part of the **matrix** Standard update in 2021. The content draws on empirical evidence about effective Information, Advice and Guidance (IAG), gathered and analysed to inform a contemporary **matrix** quality standard 'fit for purpose' now and in the years ahead. This work was conducted by David Imber FIEP on behalf of the Institute of Employability Professionals, commissioned by The Growth Company.

3 Executive Summary

The **matrix** Standard is Crown Copyright and is the property of the Secretary of State for the Department for Education (DfE). A third-party organisation, currently The Growth Company, is contracted by DfE to deliver the Standard. It was launched in 2002 and revised in 2015, having, as is seen in the evidence, made a valuable contribution to developing quality in Information, Advice and Guidance (IAG), alongside other standards such as the Gatsby Benchmarks and the OFSTED Inspection Framework, which are briefly reviewed to indicate ways in which they can complement one another and the **matrix** Standard. Comparing **matrix** criteria to other standards and offering joint assessments benefits organisations seeking to achieve the Standard.

The paper also briefly refers to the changing UK policy landscape in the aftermath of Covid-19 and relevant policy documents. However, it does not evaluate, or critique government policies nor is it intended to provide a comprehensive overview of government policy documents.

The **matrix** Standard can be applied in any IAG setting; therefore, this literature review considers good IAG practice from a wide range of services, for example Citizens Advice Bureaux, Careers Support Services, Money Advice Services, Health and Community Services, the National Careers Service, Department for Work and Pensions' employment programmes, Adult Education, Fire and Rescue Services, Further Education, Training Providers and University services, national, regional and local agencies, including private, public and third sector organisations. Each of these organisations or programmes provide IAG to support their clients in their own context and service setting. In this report, the term 'domain' refers to the context or setting for IAG; thus, for example, IAG is provided in the domain of Money Advice, in the different domain of Further Education, and so on.

The parameters of the literature review were agreed with The Growth Company and the **matrix Standard** Executive Group. Readers should be aware that this review concerns topics of interest that were agreed for analysis, feeding into a wider formal review process; it is not intended to cover all the possible matters relevant to the **matrix Standard** and IAG, but is intended to show how relevant research evidence can feed into a new and updated **matrix** quality standard, to stimulate ideas for action as part of a wider review and stakeholder engagement and consultation process.

The Review Questions

The review questions were:

- What definitions for 'high quality in IAG' have flexibility to apply across differing domains[a]?
- Does the evidence in favour of inter-personal skills, personal development, and efficacy, and for usability (etc.) of information, warrant more specific identification and use in the **matrix** Standard and guidance?
- How do quality standards apply to both personal and IT-mediated and blended delivery mechanisms?
- What standards can be described for organisations and for staff delivering IAG, to secure the benefit and minimise risks for clients?

[a] As noted above, in this report, the diverse service contexts are referred to as 'domains', and in keeping with an umbrella or overarching standard, the report discusses quality factors that are useful across all (or many) domains

— How does the evidence impact on the **matrix** Standard:
- In the overall Plan-do-review or alternative framework(s)?
- In suggesting causal linkages between delivery for clients and the supporting services and activities (mainly management, leadership, and resources), giving priority to 'what works'?
- By suggesting behavioural and resource quality descriptors to be used in guidance to **matrix** applicants or applied in assessments?

The sources, amount, and quality of evidence

For a widely applicable Standard, such as matrix, 'career', 'employment', 'education', 'lifestyle', 'personal development' choices can be re-characterised as 'life choices', applicable to whichever IAG domain is under consideration. Taking this view has helped us towards quality standards that can be applied to many IAG services.

A total of 317 research and grey literature papers were identified and reviewed. Of these, 189 proved to have a direct bearing on the subject, whether as high-quality evidence, expert professional reviews, and studies, or being important policy or conceptual documentation.

30% of the studies were rated as controlled against counterfactuals (the highest rating) or stating outcomes without controls or counterfactuals. 61% were expert reviews. Only 16 studies employed controls.

	Included studies	*percent*	*Excluded studies*	*percent*	*All studies*
Controlled trial	16	8	1	1	17
Control by Calculation	8	4	8	6	16
Outcome with weak counterfactuals	3	2	2	2	5
Outcome without counterfactuals	29	15	16	13	45
Expert reviews	73	39	35	27	108
Expert-review based policy	43	23	15	12	58
Opinion studies	3	2	17	13	20
Other	14	7	34	27	48
Totals	189	100	128	100	317

Table 1: Number and quality of sources.

There was a wide consensus about what works, values to be applied, measurement of outcomes and quality standards in IAG across the literature. The consensus is dominated by careers IAG, but that specialism is not at odds with views from other equally important domains.

Key points

Value and definitions of IAG

The social and personal value of quality assured IAG services is widely attested in the literature, as exemplified in Hooley (2014)[108].

The literature contains a variety of definitions on what constitutes 'information', 'advice' and 'guidance'. The review uses a broad interpretation following everyday English usage.
The review uses a broad interpretation as follows:

- **Information –** refers to the provision of factual information relating to the domain or topic at hand, but without exploring the relative merits of different options.
- **Advice –** refers to the provision of in-depth interaction with an individual. It includes the explanation of information and how to access and use the information.
- **Guidance –** refers to the specific needs of the individual and may involve a session or series of sessions between an individual and a skilled and trained advisor.

For the purposes of a widely applicable IAG quality standard 'education', 'lifestyle', 'personal development', 'career' or 'employment' choices can be re-characterised as 'life choices', and so applicable in many differing settings and domains of application. So, while information content may vary between IAG domains or services, information relevance, accessibility and usability may have common quality standards. Likewise, the purposes and settings for 'advice' and 'guidance' vary between domains, but all have some quality standards in common. These are the focus of this review, which has confirmed the validity of this interpretation.

Application of inter-personal guidance in IAG

There is little (if anything) in the literature to suggest that effective techniques of IAG support differ significantly between domains. The causal effectiveness of good-quality interpersonal guidance seems universally agreed; its main characteristics are identified, and references are made to literature that provides both high-quality evidence and more detailed behavioural descriptions.

There is strong evidence in support of IAG services that increase clients' capacity to self-manage, enhance their intrinsic motivation, and develop their capabilities for choices and action. On the strength of this evidence, we think that these should be further emphasised in the matrix Standard.

The quality of evidence, the range of services from which it is drawn and the proven impact on outcomes strongly suggest that the professional relationship between advisor and client is a necessary component of IAG. It enables all other resources to be useful to the client, enhances their capacity for informed choices, and mediates the contributions of leadership, management, partnerships, advice, development or training, information, and information technology.

Causality, linkages, and management

The influence of leadership and management on client satisfaction and outcomes is included in several proposed European and international quality assurance standards (for example, Neary et al 2019 [158]). But the review has not disclosed definitive descriptions of a causal link between these influences and IAG outcomes. The evidence on leadership and management is considered given this is a critical success factor in any organisation. There are some concepts that are directly relevant to IAG and already included in **matrix**, and there is scope for them to be further extended. They include:

- A degree of front-line autonomy for advisors with time to build effective relationships so they can respond to individual clients.
- Training and skills development for advisors.
- A separation between 'policing' and 'supporting' roles.
- Adequate resources and appropriate caseloads.
- Appropriate incentives and monitoring.
- Partnership working with commitment and understanding at all levels.
- Networks of services that can provide support, resources, and opportunities for clients.
- Working with the social networks to which clients belong.

A key quality element in leadership is the espousal of quality standards for front-line delivery by those who lead and develop their IAG services for young people and adults, including for disadvantaged groups.

Defining and measuring outcomes in IAG

matrix is an outcome-based standard. But the diversity of domains to which it applies means that there is no single measure of successful outcomes that applies to all. In addition, some domains have difficulty measuring their outcomes with any certainty. These appear to be compounded by the difficulty of measuring soft outcomes such as confidence, motivation, and client choice. However, a number of good quality sources that provide means to compare and measure outcomes and 'soft outcomes. It is acknowledged in the literature that for many services some rigorous methods may prove challenging. The matrix Standard currently provides organisations with best practice examples, and this topic merits greater attention in formulating the revised Standard [217, 180, 218, 12, 122].

Securing the benefits of IAG

There has been greater emphasis on inputs, outputs and outcomes in recent years, and the review identifies examples of professional codes of ethics that guide IAG services. The review has found enough high-quality evidence that benefits are not universally achieved, nor uniformly distributed among clients, and that some clients may eventually be poorly served by IAG services that serve others well. This matters, and the review includes some basic recommendations and ethical principles:

- Attention to clients' individual circumstances
- Increasing the skills of IAG advisors
- Seeking feedback and data equally from unsuccessful and successful clients
- Using comparison groups to measure
  - differential distribution of beneficial outcomes among clients.
  - service impacts compared to counterfactuals.
  - deadweight.
  - the impact of working practices.

IT-mediated and blended delivery mechanisms

We have not made an exhaustive survey of the many and varied IT applications that are promoted in IAG services; instead, we have looked at reviews that identify the advantages and limitations, and the quality standards that may be applied. It is clear that IT is useful and is here to stay. But its use can inadvertently undermine or limit the IAG quality unless it meets quality standards. A challenge to IT, when used as IAG delivery mechanism, is how far it achieves an adequate emulation of human interactions.

IT services need to be demonstrably usable, accessible, and useful:

- use by target groups wherever and however they can, including by people with disabilities or limitations.
- using both human-application standards and machine-relevant standards.
- having effective organisational and inter-organisation support.
- used by trained, competent and confident users.

The matrix overview: Plan-do-review

The evidence supports and does not suggest reasons to change the plan-do-review concept that is part of the **matrix** Standard. However, the concept is interpreted and applied, it remains at the heart of good service delivery. There are other more detailed models, and among them are a few that

could help **matrix** applicants carry out plan-do-review to advantage. But these are only weak recommendations, as the evidence is weak. Following Neary et al [158], and consistent with other models, a successful plan-do review process will cover (among other considerations)

- Policy goals: social inclusion, equity, ethics.
- Processes: customisation, relationships, open-ness and lack of bias or sanctions.
- Practitioners: professionalism, competencies, CPD and reflection.
- Outcomes: decision making competences, educational, labour market or other social or economic outcomes.
- Clients: client centredness, customisation, protection of rights, avoiding conflicts of interest.

The matrix Elements, Criteria, and practice notes

This review does not attempt to determine where our suggestions for quality indicators might appear some might be best in the published 'top-level' description of matrix, others in more detailed guidance to applicants and assessors. The suggested quality criteria are listed in section 12 and in more detail in Appendix 5.

Other Standards

The report includes brief comparisons with the Gatsby Benchmarks and the OFSTED Inspection Framework. Gatsby benchmarks, described later in this report are now widely adopted in England's schools and colleges, based on 'Good Career Guidance' principles, feeding into institutional self-improvement plans and the Ofsted Inspection Framework. It is noted there exists separate detailed 'standalone' papers and guidance notes on how both frameworks are aligned to the revised matrix Standard review Special thanks are due to Dr Deidre Hughes OBE for her valuable contribution on this area, and in the section on the Policy Background. The **matrix** Standard is complementary to these other standards, and its comparative detail will be compatible with these others' emphasis on the professional training and context in which education and careers services are delivered. The **matrix** Standard has additional value in being applicable across many different IAG domains and the report concludes that its detailed description of IAG quality can usefully be adopted to complement and read across to benchmarks and inspection frameworks within the UK and further afield.

Building future evidence

The literature review highlights a range of valid research designs and methods available. The **matrix** Standard encourages applicants to participate in evidence-based approaches leading to better understanding and enhanced quality outcomes for clients/customers.

4 The Policy background

Societies everywhere are undergoing a deep transformation. The Covid-19 pandemic, Industry 4.0 disruption[159], climate change[47], and an ageing workforce[186] have become realities impacting on the UK's social, cultural, and economic fabric. These and other key factors are being acutely felt in many local households and communities. An education, training, and local community support system, underpinned by high-quality information, advice, and guidance (IAG) is essential to increasing and spreading opportunities in the aftermath of Covid-19 to help individuals succeed. Employers need to be able to attract the right talent for their businesses to maintain their competitive edge. Individuals need to be able to fulfil their potential with barriers removed to progression[30].

Earlier the UK Government's Industrial Strategy[86] highlighted the importance of stimulating business and entrepreneurial growth. Four years on, the government's plan 'Build Back Better: our plan for growth' [199] aims to support economic growth through significant investment in infrastructure, skills, and innovation. It aims to tackle deep rooted inequalities. For example, digital poverty and the North/South divide are major concerns. The Lloyds' Consumer Digital Index[9] found that nine million people in the UK are "digitally excluded", with no or limited access to the internet. 40 per cent are based in northern England, in the cities and regions hit hardest by the wave of local Tier 3 lockdowns. In September 2020, the Prime Minister announced a new Lifetime Skills Guarantee[164] to give adults the chance to take free college courses valued by employers. The Comprehensive Spending Review (November 2020) sets out a series of support packages for young people and adults.

As part of the Government's determination to 'level up' across the country, there is a commitment to ensure that children and young people – and the families who nurture and care for them – are given the help and support they need. High-quality IAG will play an important role in this regard. Delivering inclusive growth is a key ambition of government driven through the creation of more 'good jobs' and support for people to access 'good jobs' with long-term prospects.

The UK Government's Industrial Strategy (2017)[i] highlighted the importance of stimulating business and entrepreneurial growth. The national DfE Careers Strategy (2017)[ii] set out a vision and key actions to improve careers support services for young people and adults in England. There was a clear commitment to: (i) starting careers work *early in primary schools*; (ii) *the Baker Clause*; (iii) *Enterprise Co-ordinators and Enterprise Adviser Networks*, co-funded by the Careers and Enterprise Company (CEC); (iv) The *Gatsby benchmarks* on 'Good Careers Guidance'; (v) The *Ofsted framework*- focusing on *intent*, *implementation,* and *impact*; and (vi) Careers and Enterprise Company funded *Career Hubs.* Working through a partnership approach, government-funded Career Hubs in England bring together secondary schools, colleges, employers, Local Enterprise Partnerships, local authorities, and other organisations to drive accelerated improvements in careers education and improve skills and opportunities for young people.

In January 2021, the White paper 'Skills for Jobs for Lifelong Learning for Opportunity and Growth'[iii] set out reforms to post-16 technical education and training to support people to develop the skills needed to get good jobs and improve national productivity. Local and national alignment between the Careers & Enterprise Company, the National Careers Service and Jobcentre Plus is planned to create "a clear, all-age careers system" over the next 18 months led by Sir John Holman. Gatsby benchmarks[iv] are now widely adopted in England's schools and colleges, based on 'Good Career Guidance' principles, feeding into institutional self-improvement plans and the Ofsted Inspection Framework.

The 'Build Back Better: Our Plan for Growth' (HM Treasury, March 2021)[v] is designed to support economic growth through significant investment in infrastructure, skills, and innovation. It aims to tackle deep rooted inequalities commonly referred to by Government as the "levelling up agenda"[vi].

The Queen's speech (May 2021) set out a series of new legislative plans, including a lifetime skills guarantee, which may result in high expectations for quality assured IAG across a wide range of services. For example, a new National Centre for Family Hubs will provide expert advice, guidance, and advocacy. In mid-May 2021, a new Skills and Post-16 Education Bill[b] will be introduced. It will put into law the promised reforms from the Skills White Paper, including a new lifelong loan entitlement, local skills improvement plans and greater powers for the education secretary to intervene in colleges that fail to meet local needs. The benefits of the new Bill include:

- Offering adults across the country the opportunity to retrain in later life through the lifetime skills guarantee, helping them to gain in–demand skills and open up further job opportunities.
- Realigning the system around the needs of employers so that people are trained for the skills gaps that exist now and, in the future, in sectors the economy needs including construction, digital, clean energy and manufacturing.
- Improving the quality of training available by making sure that providers are better run, qualifications are better regulated, and that providers' performance can be effectively assessed.

In July 2021, the Department for Education (DfE, 2021)[vii] updated 'Careers guidance and access for education and training providers: Statutory Guidance for schools and guidance for further education colleges and sixth form colleges. Career Hubs were expanded through the Careers and Enterprise Company to include over 3,300 schools and colleges so that more (approximately 67% of) schools and colleges can benefit from government-funded careers support. "This will continue to accelerate the progress of all schools and colleges towards achieving the Gatsby Benchmarks so that all young people are equipped to make informed career and learning decisions" (Baroness Berridge, HoL, July 2021)[viii].

Government has acknowledged skills gaps and shortages as two of three key challenges facing employers in the labour market today, alongside concerns over the work-readiness of education leavers. It has recently announced several initiatives to tackle the problem of skills under-utilisation, including the following:

The Skills Accelerator Programme[ix], which includes two key components:

- *Local Skills Improvement Plans (LSIPs*) intended to "set out the key changes needed to make technical skills training more responsive to employers' skills needs within a local area". They will be created by employers and providers, with employers asked to set out an assessment of their skills needs, to which providers can respond.
- *The Strategic Development Fund (SDF)* pilot will provide capital and grant funding for projects intended to build providers' capacity to meet local skills needs.

The Lifetime Skills Guarantee[x] will offer learners who have not yet got a level 3 qualification the opportunity to study for a fully funded course in a skills shortage area. It includes the Lifelong Loan

[b] The Bill forms the legislative underpinning for the reforms set out in the Skills White Paper.

Entitlement for the equivalent of four years of post-18 education (from 2025), whether it is taught in a college or university. It is hoped this will enable people to study in a modular way and in a flexible means to suit them. The Government is due to consult on the Lifelong Loan Entitlement this year.

The Skills and Productivity Board[xi] (an independent board to conduct expert analysis of national skills needs to inform government policy), the Green Jobs Taskforce (convened by DfE and BEIS) and the Office for Talent (a cross-departmental team to make it easier for leading scientists, researchers, and innovators to come to the UK).

Skills bootcamps[xii] are intended to support skills development, funded by the National Skills Fund. They offer free courses of up to 16 weeks for adults aged 19 or over who are in work, self-employed, recently unemployed or returning to work after a break. They are available in areas including construction, digital, engineering and manufacturing, rail, and green skills. By the end of March 2021, the Government reported that over 3,000 learners had participated. It expects to deliver 16,000 training places in 2021. Ofsted is due to report on their effectiveness by September 2022. *Institutes of Technology* were introduced in 2019 as collaborations between FE colleges, universities, and leading employers. In January 2021, the Skills for Jobs White Paper set out ambitions to expand them to "spearhead the increase in higher-level technical skills" in STEM.

In the Autumn Budget 2021[xiii], the Chancellor committed to increase skills spending 26% in real terms (£3.8 billion) by 2024–25. This includes funding for 16–19 education (£1.6 billion), capital investment in 20 Institutes of Technology and FE college infrastructure (£2.8 billion), the new adult numeracy programme 'Multiply' (£560 million), additional measures to increase opportunities for adult upskilling and reskilling (£554 million) and increasing apprenticeship funding to £2.7 billion. These figures combined exceed the total headline amount announced in the Budget[c].

In mid-November 2021, the Skills and Post-16 Education Bill passed its Second Reading in the House of Commons. The Chair of the Education Select Committee responded[xiv] by urging government to (i) improve career education and guidance for all students, (ii) help all adults get the education they need to get fulfilling jobs, (iii) do more to boost apprenticeships, and (iv) make sure the curriculum and education provide skills for the world of work. Earlier, Hector (2021) [xv] highlighted an urgent imperative to reflect and decide on how best to provide career guidance to young people and adults at a national, regional, and local level. A recent House of Lords report on 'Skills for Every Young Person' (November 2021)[xvi] stated:

> *"Careers education, information, advice and guidance (CEIAG) must be recognised as a critical component of a young person's education up to Key Stage 4 and beyond in all schools…CEIAG is a fundamental part of education and should be treated as such."* (para.119).

The extrinsic benefits of careers education on students' attendance, attainment, and achievement, particularly for children and young people living in socially disadvantaged areas have been made explicit[144]. The government Kick Start initiative[224] and greater promotion of traineeships to support young people hit by the pandemic are designed to create apprenticeship and training opportunities.

In Wales, the delivery of the National Careers Service (Career Choices Dewis Gyrfa Ltd (CCDG) - Careers Wales: Brighter Futures 2021-2026[211] supports the Welsh Government's social, wellbeing and

[c] This is due to funding being previously announced and allocated.

economic goals. The services are working in partnership with DWP and local community partners. Welsh Government post-compulsory education and training (PCET) reforms[134] include a new Commission for Tertiary Education and Research, to ensure that professional, independent advice and guidance of education and career pathways is available to all in post-compulsory education and training. Aligned with the PCET reforms, are digital skills needed to support the Welsh economy. Careers and Work-Related Education (CRWE) feature within the new Curriculum for Wales 2022[88] with statutory guidance due to be published shortly by the Welsh Government. Careers Wales has been tasked by the Welsh Government to develop a new quality standard for schools and colleges' IAG. The Additional Learning Needs and Education[126] has established a statutory framework for supporting children and young people with additional learning needs.

In Scotland, many differing organisations contribute to the development of individuals' IAG experiences. In a careers context, these are best described as a 'careers system' with relationships formed as part of, or sometimes separate to, the work of Skills Development Scotland (The National Careers Service). A quality improvement framework is used by HM Inspectors when carrying out school inspections, recognising that career education, supported by Skills Development Scotland, contributes to the overall performance of individual schools. A similar approach is taken through the quality improvement framework 'How Good is Our College'. The Quality Assurance Agency for Higher Education (QAA) take a thematic approach to work with Universities in Scotland to ensure career services are meeting the needs of learners. The Scottish Government's strategic plan 'A Changing Nation: How Scotland will Thrive in a Digital World'[87] (March 2021) sets out the measures which will ensure that Scotland fulfils its potential in a constantly evolving digital world. Skills Development Scotland contractually requires training Providers to work towards quality standards in order to demonstrate excellence in the delivery of Modern Apprenticeships, Foundation Apprenticeships and Employability Activity[188].

In Northern Ireland, central to the Careers Strategy 2015 -2020 is the development of an accountability and quality assurance framework[42]. The national Careers Service NI in the Department for Economy has adopted the **matrix** Standard to assess the quality of provision and services to young people, adults, and other key stakeholders. Careers education is externally assessed by the Education and Training Inspectorate within the Department of Education. An OECD Review identifies wider opportunities to develop a culture of lifelong learning[179].

5 Descriptions of quality in IAG that apply across differing IAG service domains

The **matrix** Standard provides a basis for organisations to assess their IAG service against criteria that provide insight and evaluation into every important aspect of the service. Last reviewed in 2010/15 [30], it has provided valuable support to many organisations, providing a range of IAG services, and is a valued standard alongside the Gatsby Benchmarks and the OFSTED Education Inspection Framework. The Standard is also approved under the Welsh Governments Information Advice and Guidance Framework (IAQF)[148]. It provides quality assessment and accreditation to organisations within and outside educational settings. It is an 'umbrella' standard, in which IAG is assessed for its quality no matter the context or domain in which it applies. This is a strength of the **matrix** Standard: it focusses on applying quality measures to the service provided, its context and circumstances, and thus on the value and impact on the service's clients.

There is good evidence from a number of sources and IAG domains that 'good quality' IAG has measurable benefits for clients [23, 146, 170]. There is limited but well-proven evidence that IAG does not affect all clients equally, and may not be beneficial for some[16, 54, 136, 28]. These studies do not imply that the IAG offered was of low quality; they do show that the impact of good IAG depends on many factors and may be different for different clients. Those differential impacts can be important for a Standard, because, if well understood, they can point towards future improvements.

Different domains of IAG have different definitions of intent, implementation, impact, goals or outcomes, and several commentators remark on the difficulty of reaching a single definition of quality. Each domain is embedded in its own social context and is influenced by many factors. This leads to diversity and contrasting findings in the evidence base. But there are consistencies, overlaps and agreements between domains. This argues for a search for those things that can be observed in effective IAG when comparisons are made between or across domains. Shared themes, activities and approaches are readily identifiable. This in itself is evidence that an 'umbrella' standard can be valid and useful, as has been shown in practice by the **matrix** Standard since its inception. In support, it is noticeable how taking quality descriptions from one domain and replacing its domain-specific terms with terms from another, leaves it with no less validity. For example, bracketing the domain-specific words, we arrive at a general description of quality:

> "We know that when individuals face an initial (*occupational*) choice or change (*jobs*) it helps tremendously to have a compact view of the world (*of work*).
> We also know that (*vocational*) exploration and information-gathering increases self-knowledge and awareness of suitable (*educational and occupational*) options"

or

> "Recognise, develop and apply skills for (*enterprise and employability*)
> Develop an awareness of the extent and diversity of opportunities (*in learning and work*).
> Use their experiences of the world of work to extend their understanding of (*careers and work*).
> Learn from contact with people (*who work*).
> Learn about how and why (*businesses*) operate.
> Learn about (*working*) practices and environments. Undertake tasks and activities set in (*work*) contexts." ." Text adapted (our italics) from Hughes & Gration[113].

Measurement

Choosing a scale on which to measure quality is difficult in the absence of a clear framework which organisation and practitioners can adopt. The **matrix** Standard provides such a framework and supports the quality assurance and measurement process. But no framework can answer all the questions, and some decisions or choices have to be made by the services themselves. Bimrose et al[23], for example, highlight that if outcomes are measured, what percentage is acceptable, for what categories of clients? If inputs are measured, how can their effectiveness be ascertained? If information is given, how is its value to clients to be judged? What is it within a service that makes the difference, and how do essential supports contribute to effectiveness? And we may be in danger of "*counting that which can be measured rather than measuring what counts.*"[115, 222]. The **matrix** Standard is, and will need to remain, flexible enough to accommodate these issues.

Measuring that which is to be quality assured involves having a clear sense of:

- what is to be measured and for what purpose?

6 who is the audience?

- what systems and procedures are in place for collecting and collating relevant data?
- what management and quality assurance arrangements exist to ensure that data are acted upon in order to effect change and maintain the quality of services?[16].

Precision

Within the literature, we have seen many examples of generalisation of concepts and of the terms used for them, visible as a gap between nebulous expressions and observable behaviours or characteristics. If quality is to be measured, it is better to rely, where possible, on concretely measurable standards than on generalities.

An example is 'good relationships' and a more precise description such as

> *"Remember information the customer has provided previously; reflect both the current resistant statement and a previous contradictory statement; use neutral language such as 'and' rather than 'but' to maintain the balance of emphasis."*[89]

That said, there is agreement in the literature about some important aspects of quality that may not be reducible to unambiguous statements or observations: ethics is an example[7].

Acknowledging this diversity of quality measures, there is still much agreement about that which counts as quality in IAG.

The human, community and social context of IAG.

Human interactions, psychology and social setting affect the context, performance and outcomes of IAG[3]. Clients differ in many ways: groups, chosen to benefit from a common service (such as young people, or migrants, or indebted, or prisoners) are not similar; within each group, individuals differ one from another[181, 115, 177]. That said, similar 'what works' interventions can be seen in several domains and may apply to differing individuals. There appear to be some uniform and basic principles that need to be implemented, with sensitivity to the needs of groups and individuals.

There are well-evidenced connections between mental health and personal status (employment, financial security, housing for example) though the direction of causality is often uncertain: poor circumstances and hard times can lead to poor mental health, and vice versa: this context is relevant to IAG provision, and while IAG can contribute, as a side-effect, to improved mental health[227, 25], IAG providers should not engage in therapy, unless professionally qualified and accredited to do so.

Social Goals of IAG

IAG has social goals: the promotion of equal or 'fair' opportunities, reduction of poverty, improving the functioning of the labour-market, building cohesive communities are examples[148, 135]. These goals often bring in train ethical and human values that can be reflected in the choice of quality standards. For example, the Debt Advice Quality Framework themes include "*Accessible, Responsive, Trusted, Compliant, Transparency and longevity, Leadership, Effectiveness, Reflecting, Actioning*".

Hughes et al[118] say that "*Guidance is informed by five main principles: user-friendliness, confidentiality, impartiality, equality of opportunity, and accessibility.*" Some of these may be readily measured using administrative data, but 'friendliness', 'trust' and 'equality' need more subtle consideration. Customer feedback and satisfaction ratings provide approaches that we discuss below, but that are not always straightforward to apply.

Good IAG

Good IAG should provide sufficient resources and can define what their quality standards are, wherever possible measuring against concrete criteria. There are some examples of resource banks and quality statements which contribute to achieving this quality goal, among others the Career Development Institute[125] and National Technical Assistance Center on Transition[162], The Information & Advice Quality Framework for Wales[148] and the Institute for Employability Professionals[119].

Good IAG responds to the environment or circumstances. The circumstances may encourage or hinder the service, limit its resources, and encourage or divert its clients[189, 228]. Responses to each situation may be practical, ethical, and strategic. A quality standard needs a means (such as the **matrix** Standard's Plan-Do-Review) to plan and evaluate the response.

Good IAG does what is effective for clients by including processes, inputs and supports that have been shown to be effective. A 'what works' view of quality seeks to identify active ingredients that are thought to be essential to the production of outcomes. The literature has examples including:

- the advisor-client relationship as a necessary component.
- relevant activities and experiences for clients
- links between agencies
- co-operative working
- information provision
- tailoring to client needs
- skilful support for clients' progress[13].

Good IAG achieves its goals or 'outcomes' for clients. They may be readily measured 'hard' outcomes, such as employment or housing. 'Soft' outcomes such as increased self-esteem, self-confidence, motivation, and independence are equally important because they matter to clients and are necessary stages towards some hard outcome. The literature has good examples of measurement of 'soft' outcomes, and descriptions of the difficulties that arise in measuring hard outcomes[222, 12, 23, 108, 193, 94].

Good IAG is concerned with progress (distance travelled) as well as final results. The concept is analogous to a journey from their initial circumstances towards an ultimate goal. There are opposing views as to its value. Some regard the goal itself as the only valid outcome (as illustrated in policies which provide funding based on such outcomes, usually employment), and others recognise that the length and duration of the journey, roughly proportionate to the degree of disadvantage faced by the individual client, is such that progress should be recognised, and in some cases that different

services are needed in sequence or in combination, to support progress[11, 137, 97, 140] . Measurement of distance travelled is not straightforward, but can be done[219, 122, 123].

Good IAG involves, listens to, and responds to clients[146]. It relates to them as individuals receiving a service tailored to their needs, and as customers who can offer valuable feedback and input[97, 154]. Neither activity is simple, and both are skillful[152, 120], and the competence of the organisation and the people in it are essential.

Good IAG is achieved by organisations that review and improve their policies, organisation, processes, staffing, outcomes and customer experiences[106, 175, 6].

The **matrix** Standard is an umbrella standard, so measures of quality included in it may need to be supplemented by domain-specific measures. These are likely to focus on

- domain-specific information such as Labour Market Information, Educational opportunities, Healthy Living guides and so on, or
- client groups unique to a service or domain e.g., a disability specialist service or
- any required legal or administrative standards e.g., FCA authorisation.

A specific example of an educational support framework in England is illustrated below. 'Good career guidance'[41] is described within the Gatsby Benchmarks**,** endorsed by the Careers and Enterprise Company and Department for Education. The framework contains 8 benchmarks which act as a guide for schools, colleges and alternative providers to design, develop and evaluate the impact of careers education, information, advice and guidance[40, 41]. The review process has aligned the revised Standard with Gatsby benchmarks to assist organisations closely involved in career guidance development work.

An evaluation of the North-East of England pilot Gatsby Benchmarks[93] highlights progress made implementing the Gatsby Benchmarks and the impact this has on learners over time. This evaluation strategy was an adapted Kirkpatrick model and used both qualitative and quantitative research to explore processes and identify impacts. The eight benchmarks are fully listed in Appendix 2.
They cover:

1. A stable careers programme
   Activities should include assemblies; enrichment activities; tutor time; PSHE; employer encounters; workplace experiences.
2. Learning from career and labour market information
   Information should include skills, career pathways and progression routes in the local labour market; job applications and interviews educational institutions, courses, qualifications, entry requirements and costs; professional bodies; employment sectors, employers, jobs, salaries and employment trends; jobs, training and apprenticeships; job demands and working life; and financial planning.
3. Addressing the needs of each pupil
   Resources may include Local Authority destinations data; Compass tool and/or Compass+, Unifrog, START etc.
4. Linking curriculum learning to careers
   Providing career learning as a subject in its own right: in this approach careers content is delivered as a discrete curriculum, e.g., careers education or as part of PSHE; Incorporating career learning within other subjects; and organising career learning through co-curriculum activities.
5. Encounters with employers and employees

Employers and schools work together in creative ways to ensure students build a rich picture of the world of work and are well prepared to take up workplace opportunities. Schools provide first-hand encounters with employers as part of careers and enterprise programmes for years 7 to 13 and celebrate these links in their prospectuses and on their websites.

6. Experiences of workplaces

   Younger students and students explore careers and the world of work, relate their learning to the real world and develop their employability skills. Post-16 students, especially those in technical education, focus on activities closely aligned to their study programmes.

7. Encounters with Further and Higher Education

   Schools have a multi-pronged approach to ensure students are well-supported to choose pathways they value post-18. They start this work long before students reach the point of decision as evidence shows that raising aspirations and building resilience is effective from year 7 or earlier.

8. Personal guidance

   The school or college offers personalised support tailored to students' needs and abilities. The advice is impartial and always in the best interests of the young person. It has an observable impact on their career and progression.

6 The evidence for inter-personal skills, personal development and efficacy.

There is strong evidence from researches across a long period[70, 133] and differing domains and geographies[52, 85, 130, 167, 168, 176] that supports approaches that include or focus on enhanced self-efficacy, positive affect, emotional intelligence and anxiety-reduction in clients. Experimental studies do not cover all domains equally, but good quality studies are available in a number of settings. They have produced a clear consensus about effective advisor skills and activities.

The widespread agreement, and good quality research, strongly suggest that the quality of the relationship between advisor and client is an important component of successful IAG delivery[146, 13]. It is also the case that the specific attitudes and behaviours that constitute a 'good quality relationship' are well understood[152, 88, 145, 25, 28, 97, 204].

Within the evidence for quality relationships and their psychological underpinnings, the concept of self-efficacy is supported by strong evidence from around the world and across different domains over time[208, 130, 168, 51, 227]. Self-efficacy is the judgement a person makes about their confidence to carry out specific tasks, and is related to effort, persistence and outcomes from their efforts. Self-efficacy may be enhanced or diminished by an IAG intervention, and those which enhance it are most likely to lead to positive outcomes. The methods by which self-efficacy can be enhanced are well understood and should be present in IAG services. Related concepts -such as Self-determination Theory, Self-confidence, Emotional Intelligence and others, are not in conflict with this widely researched and confirmed theory[177, 78, 85].

Client reports, though not using the same theoretical or professional language, confirm the value of self-efficacy enhancements and supportive advisors[99].

The references above also show that benefits from efficacy-enhancing interventions are not uniformly distributed: people with low levels of self-esteem benefit more than those with higher self-esteem. Levels of self-efficacy and self-esteem are linked to other indicators of disadvantage and disconnection from employment, education, housing and other necessities. The direction of causality is uncertain, and mutual reinforcement is recorded between self-efficacy measures and goal achievement[8, 227]. A few studies confirm that the benefits of self-efficacy enhancing IAG go beyond the immediate goal of the guidance, offering 'spill-over' benefits. There is some limited evidence that efforts to enhance efficacy among those with already-high efficacy may actually reduce it, though the possibility of reversion to the mean is noted[51, 180].

Self-efficacy can be relevant to advisors' choices about how best to help their clients. Self-efficacy can be modified (up or down) by advisors' interventions. Thus, for example,

> *"career counsellors encountering individuals who have …. overly perfectionist aspirations should … interpret them not as maladaptive, but as a reflection of the individuals' great confidence in their own ability to achieve their occupational goal."*[83, 168]

IAG approaches that provide psychological support using concepts such as self-efficacy, emotional intelligence, personality traits and others, need to be goal-focussed and applied in the context of relevant life-choice skills (e.g., job-search, money management, career choice), and relevant and sensitive to the social context and influences. Clients' reports of their confidence to carry out actions in this overall context will be relevant to their decisions about what should be included in action planning[34, 193, 182].

Training that includes skill-enhancement as well as psychological support is effective in both one-to-one and group training settings[91, 210].

A minimal ethical standard for IAG is that practitioners should not use psychological interventions to enact therapy. They should be used in prescribed ways to support clients' capacities. Any therapeutic benefit or disbenefit should only be a side-effect that may deserve attention[182].

Giving information on its own is less effective than when it is supported by advice and guidance. Advice and guidance enables clients to apply the information that they receive: it is necessary to making use of information; information itself may also be necessary, though enabling clients to act under their own direction may sometimes be sufficient[202, 23, 177].

Skillful activity by advisors depends on its behavioural details. There is a broad consensus on descriptions of skills applicable across different IAG domains. Frequently listed examples (these are not comprehensive) are skills to:

- establish trust with clients
- enable clients to make their own choices
- enable clients to make use of information
- enable clients to act purposefully

and this is done by

- listening and questioning
- reflecting
- challenging
- exploring Choices
- providing feedback
- providing Information
- teaching or coaching

using

- verbal and non-verbal communication skills
- ability to reach agreement about goals and tasks
- teaching / training skills
- setting (agreeing) clear objectives,
- observation of the activity and behaviour of others
- supported activity
- providing a rationale
- modelling behaviours
- checking for understanding
- guiding practice towards mastery
- encouraging independent practice.
- social support
- ethical behaviour.

More detailed descriptions, down to the level of observable behaviours, are to be found in the literature on talking (psychological) therapies, in employment assessments, in the training of Careers Advisors, Social Workers and other social advisors. Graham et al[89] give a detailed example, as do Blonk et al[25] and others[18, 181, 77, 178, 100, 67 and 130].

The activities of clients that are included in effective careers guidance may generalise to other IAG domains: for example, Hughes et al[117] list:

- *"Reflection—making concrete the thinking about one's own motivation and aptitudes, self-regulation, self-determination, and resilience to cope with unforeseen setbacks;*
- *exploration—giving shape to one's own (career) path by exploring the options (for study or work).*
- *action—opportunities to make sense of, and act upon, the learning gained from differing types of interventions;*
- *networking—building and maintaining a network of key contacts;*
- *learning environment—stimulating real-life experiences (with work) and a dialogue about these experiences;*
- *dialogue— (young people) having meaningful conversations with (teachers, parents or carers, employers and employees, alumni, and trained and qualified career development professionals); and*
- *conversations (in the workplace) - giving (students) exposure to, and experience of (work in) real-life situations*."

These relationship-building and support skills can be included in professional training, as for example in the Careers Development Professional Apprenticeship Standard[6] which includes:

> *"S7: Build and sustain positive and constructive working relationships, resolve conflicts constructively in ways that do not undermine confidence;*
> *S8: Engage and sustain relationships with employers and opportunity providers, individually or as part of organisational networks*".

They are also present in the recently launched Institute of Employability Professionals Level 3 Certificate in Employability Practice[75].

Cultural awareness, respect and inclusion matter to the quality of IAG services. This extends to who (such as family) may be involved in some more-or-less active role in the IAG relationship[19].

There are differences in the degree to which various domains of IAG depend for their quality on professional practice and the training of practitioners. The provision of professional training in the skills of IAG is not yet equal in level or content across all domains. (Health, Nursing, Housing, OFSTED, Gatsby, Employability etc). Inclusion of descriptions of advisor behaviours supportive of good IAG would strengthen the **matrix** Standard for those domains where professional preparation and accreditation is currently weaker or under development. Inclusion would not harm those domains which already include advice skills and behaviours in their required professional preparation or training. This argues for **matrix** guidance, to include some detailed descriptions of behavioural skills in IAG - and these would not be in conflict with existing standards such as OFSTED, Gatsby Benchmarks, or Careers Apprenticeships[165, 103, 38].

This section has focussed on inter-personal skills, personal development and efficacy, and has found them to be shared themes across the wide range of domains that the **matrix** Standard covers. Within a single domain, the relevant domain-knowledge will be needed to complete the advisor's competence. For example, financial advisors in the Money Advice Service need to know about banking, debt, FCA regulation and more[228], all matters that are of interest to (say) a health or careers advisor, but not central to their practice.

7 Information, digital, social and new technologies (IT)

This review did not include an exhaustive survey of the many and varied digital applications that are promoted in IAG services. It examined the advantages and limitations, and the quality standards that may be applied. The ubiquity and value of IT / digital applications make it clear that the role of quality assurance in digital development is going to become more important. This 'hot topic' is an important part of the **matrix** Standard review process in future proofing the Standard in the year(s) ahead, and this section examines some of the considerations around IT and digital services that are relevant to **matrix.**

What's changing? Everything[138, 150]. The pace of technical change, from smart phone to high-speed internet, from databases to 'artificial intelligence', from travel-to-work to online meetings, implies that quality standards for IT need to be widely applicable in different technical, social and organisational contexts. Ten years ago, Hooley and Watts[104] reported that:

> "*ICT is being applied in ways that are changing how career support is being experienced by individuals. This is not a complete transformation, but rather a rapid evolution in the ways in which career support services are managed, delivered and taken up…..New technologies are …. being used to support and extend existing ways of delivering career support. However, they are also being used to develop new service paradigms, especially related to the communicative potential of social media applications."*

In 2021 Hughes et al wrote that

> *"Artificial Intelligence (AI) and the impact of digital advancements and the pandemic are changing the meaning of what a "career" is."* [114]

Social media appear ubiquitous[24]. There are gains to be hand in using social media for communication between clients and advisors, but their penetration and acceptability are strongly age dependent. They are not gender- or ethnicity- neutral[203]. Information presented on social media is not automatically trusted, even if it is from a reputable public source. The language and images used, and the tailoring of communication to users are important. According to Plaisime et al [172], it holds out promise as an effective health communication tool and could potentially help change norms or help teens deal with peer pressure. This usefulness does not validate it as a universal IAG tool[22].

'Machine Learning' (ML) and Artificial Intelligence (AI) are of increasing interest to IAG services. As an example, the CareerTech Challenge is a £5.75 million partnership between Nesta and the Department for Education to improve people's working lives and unlock employment opportunities for the future, using digital solutions to "*improve access to the information and guidance people need to pursue fulfilling careers.*"[44, 45]

The new technology claims to be able to learn from complex inputs (voice, text, data, IT records, user interactions) in order to generate reliable solutions to novel combinations of inputs. This holds promise for application in IAG, where complexity of information is the norm. A number of (computer, smart-phone, android, automated, non-human, etc.) programmes offering IAG services are available in the UK, of which 20 were shortlisted for the CareerTech Challenge award.

This review has not found independent evidence about the quality or effectiveness of ML or AI to clients of IAG services. This literature is gradually evolving. In view of the strong evidence that

skillful activity by advisors depends on its behavioural details, and of the broad consensus on descriptions of skills (above), a precautionary approach to standards for ML and AI in IAG settings would be to ensure that these activities are present within the application or made available to users through a blended human-machine co-operation. Hughes et al caution that:

> *"It is not good enough to have chatbots designed only by tech experts. Content needs to be based on human behaviour and conversations……. Conversational modelling is an important task in natural language processing, as well as machine learning….this is challenging. …… for something as complex and often intensely personal as searching for opportunities to improve their income and livelihoods, people need to access curated information in an environment they trust, with access to a trained professional to help contextualise, challenge and act on the information if they want it."* [114]

AI & ML may have an increasingly valuable contribution to make to IAG, provided they are subjected to the same (or equivalent) quality standards as advisors[10], and to design and usability standards that apply to more traditional IT systems and are explored below.

Use of IT, even when well-designed and easy to use, needs to proceed with caution: users' needs may not be equally well met; formal IT-based information may not be utilised as intended; information may be too hard to interpret and be ignored. Indeed, subjective impressions and informal sources often supersede formal information as the key factor in decision-making.

The growth and diversification of IT applications is a challenge for quality standards. As an example, there has been demand for and use of telephone guidance for well over a decade, probably much longer. It can be of high quality and can offer advantages. But it is not uniformly accepted, and surveys have reported mixed results[166]. Siau and Wang[190] give examples of the factors leading to trust in AI systems (listed in Appendix 2) and they note that "*Ethics and governance of artificial intelligence are areas that need more attention*". Sillence et al [191] conclude that "*Credibility and impartiality continue to be key predictors of trust in eHealth websites.*"

What is IT good for?

Effective use of IT brings operational gains. Where they are achieved alongside high quality inter-personal interactions[17], the gains can be substantial[196], and include:

- high levels of client satisfaction
- ability of advisors to handle multiple dialogues
- targeting clients who are most in need of real-time assistance
- facilitating access to services for non-native speakers and
- making flexible service delivery easier.[53]

These advantages aside, there are gains from rapid and effective monitoring of service processes and outcomes.

As long ago as 1984[84], one good quality comparative study showed that the combination of IT with personal counselling was more effective than either alone. But IT applications have changed radically since that finding. The internet presents an opportunity for cost-effective and widespread dissemination of IAG across most areas of welfare, particularly when the internet is gradually spreading to excluded groups such as the disabled and older people[94].

Digital IT may be used to improve access for clients, or to reduce costs of services, or to diversify provision of IAG. Each of these advantages has its own risks and calls for quality control[24]. Itcan bring benefits to advisors. One implementation gave mentors more flexibility accessing their students'

profiles, reviewing their progress, and replying to or posting messages. Having the time to look at each student's profile or read a question posted by them allowed the mentor time and information to carefully consider an appropriate response[27].

Digital IT has a place in recruitment, through online tools. But this has not supplemented, not replaced, traditional methods and networking, as observed by Davern[56].

The data-handling capacity of IT makes it a useful tool for labour-market (LM) intelligence, and it has a long history of such use. However, this too is subject to quality criteria: highly local LM information, which is a bedrock of employability advice, is hard to gather, changes rapidly, and may contravene confidentiality or data protection measures. The accessibility and communicability of data for a non-expert users can be a challenge[102], as anyone acquainted with NOMIS or O*NET will understand. Technical advances have made it possible to gather data from many sources and present them to users in accessible and usable style – an important advance on single-source IT systems. Some system relies almost entirely on automated data collection, such as EMSI[76], others on a combination of human and automatic collection, such as Jobskilla[131] .

Who uses IT / for whom is it useful?

There are few studies of the differential use of digital IT by various groups. Young people are probably more open to some applications[27] - such as social media, or dedicated communication channels, but may possibly resist others - such as databases[193]. Young people appear to value the involvement of people in the provision of career information, seeing them as more important and/or more helpful than written sources of information[27, 193]. However, access to suitable equipment, at least at home for personal use, is far from uniformly available: in 2020 it was reported that:

> *"nearly one in ten (9%) young people had no access to a laptop, desktop or tablet at home. Digital poverty is particularly prevalent among those from lower socio-economic groups, where one in five (21%) households with children have no access to an appropriate device, and over one in twenty (6%) have no access to the internet."*[39]

And that:

> *"11.3 million people (21%) lack the full basic digital skills*
> *4.3 million (8%) have no basic digital skills at all*
> *5.4 million working adults (10%) are without basic digital skills*
> *people with a registered disability are 4 times as likely to be offline*
> *28% of those aged 60+ are offline."*[d]

Consistent with these figures, demand for IT applications seems to be less among older people, and among people without access or skills to use IT[166], though metrics are in short supply.

There are few studies that discuss the accessibility or usefulness of IT across a range of social or cultural groups; though one study[203] suggested that social media had high value for refugees and migrants and discussed a variety of interaction and applicability issues.

[d] https://www.gov.uk/government/publications/essential-digital-skills-framework/essential-digital-skills-framework

Particular care needs to be taken in the design of digital applications to ensure that they are relevant and appropriate to their target audience. Also, attention should be given to biases which may amplify inequality if they are encoded within digital advice systems.

What is IT less good for?

With regards to use of new digital approaches e.g., artificial intelligence (AI) in IAG there are two kinds of harms that researchers have shown to arise from AI bias. Allocation harms occur when a system allocates opportunities or resources to certain groups or withholds them. Representational harms occur when systems reinforce discrimination against some groups because of identity markers such as race, class, gender, age, belief or ability. These harms can take place regardless of whether resources are being allocated. This deserves consideration in the revised quality Standard.

Labour market information is generally felt by advisors to be difficult to apply to telephone guidance in practical terms[166]. As noted above, IT may face some issues in collecting very local labour market information; but it may be excellent at communicating it quickly to clients. A systematic review of comparative studies on the interactional differences between telephone and face-to-face psychological therapy[127] confirms that a blended approach is necessary for effective practice.

Crowd-sourced (online) heuristics about reliability of information needed in IAG may enhance or damage the actual validity of the IAG service, with beneficial or harmful results[94].

Safety, security and privacy for the users of internet services of concern. Organisational firewalls, erected for safeguarding and security, may prevent the use of certain IT features (such as particular social networking sites) by practitioners delivering services. These types of restrictions represent a barrier to IT integration and inhibit creativity and innovation[22].

There are some clients for whom face-to-face support may be more appropriate[10]. Examples are individuals for whom English is a second language, clients with some specific mental health problems, and people for whom IT presents understanding and use challenges.

When a central IT system replaces a face-to-face system, there can be important consequences[166]. As an example, introduction of telephone advice may result in advisors:

> "*becoming less alert to the informal relational aspects of [legal / housing] casework. An impact of telephone delivery may be to distance the adviser from the tacit forms of knowledge that are integral to casework."*[37]

Bespoke advice is difficult to deliver, and partnership working is hampered.

In another case, it appeared that clients were unaware that they had developed an action plan during telephone advice, though the reasons were unclear. Other possible losses include loss of physical presence within a community; loss of local referral networks; loss of physical and geographical knowledge of an area and loss of social understanding and contact with local services.

Digital IT should not be assumed to have more validity than other sources. The facility with which IT handles communication and data retrieval is an important advantage; but this ease-of-use and access may encourage undue belief in the validity of the source. And as noted above, communicating information as effectively as through human advisors can be challenging[53]. The same risk of apparent rather than real source-validity also applies to advisors and is one of the foundational ethical reasons for clients to be supported to make their own judgements and decisions[27].

Digital IT is not neutral. It can have a monitoring and regulatory role towards the client - whether this is good or bad may depend on your ethical position and on the degree of transparency and consent. For example[53] one public employment service has set up a 'proactive profiling' system. Jobseekers' (online) job search records are linked to information from their online personal folder:

> *"Based on other jobseekers' data, a model measures the likelihood of insufficient search activity. .... if 'anomalous behaviour' is detected, it is flagged up to employment counsellors…who can contact the jobseekers to give them advice and remind them of their duties."*

In this system, a job seeker carrying out personal networking and failing to record it (if indeed it is recordable) would be automatically disadvantaged, as would one lacking the right IT skills.

Screening or diagnostic tools[21], used to determine eligibility for programmes, and subsequently to guide advisors, have a margin of error, sometimes wide. The risk of 'false positives' and 'false negatives' may outweigh the costs of data gathering and analysis, and at the least call for involvement of human judgement at an early stage[17].

Quality descriptors for effective IT

Digital IT offers advantages not achievable by other means. It carries the risks outlined above, and quality standards for IT can help avoid them and achieve the gains that it can offer.

Quality descriptors for digital IT-supported IAG appear very similar or identical to in-person delivered IAG quality descriptors. This lends weight to the use of a common set of quality standards or indicators across IT-mediated services. Examples are given in Appendix 2, where it is noticeable that all are concerned with, or very similar to, the qualities of person-to-person communication.

Digital IT services need to be accessible. Three interpretations of 'accessibility' are relevant:

- web and mobile services that can be used by people with disabilities / impairments, as given at https://www.w3.org/WAI/standards-guidelines/wcag/
- web and mobile services that can be reached, used and understood by all their target groups. Examples: a public-access computer in a library should be reachable by wheelchair users; a website for refugees should be in their native language, smart-phone applications need smart-phone owners
- human-application standards need to be supplemented by machine-relevant standards for digital IT Usability and Acceptability. They can be challenging for web designers, for whom the elegance (or otherwise) of technical solutions might be achieved while creating difficulties for users. Neilsen and others provide guides that can help IAG experts and clients advise systems designers[90, 129, 161].

Successful integration of IT requires organisational level support. The evidence of *how* this should work is scant; integration of human and IT services requires well-designed applications, effective organisational and inter-organisation support, and also trained, competent and confident users[132, 20, 22, 104].

8 Securing the IAG benefits for clients.

The distribution of IAG benefits

As noted above, IAG services have been shown to be effective in many studies. These studies do not indicate that all clients benefit equally. There are a small number of studies, including some of high quality, that show that IAG does not always benefit all clients[3]: there can be

- positive or neutral results when averaged across clients, with an almost certain difference between successful and less successful outcomes within the average
- differential results between groups[31, 180, 189, 228].
- There are a few instances in which supported groups have done worse than 'no treatment' comparison groups[136, 180]. A uniform service that does not adapt to clients' gender, economic status, ethnicity, geographic location, age, health condition, educational attainment and so on, is unlikely to produce uniform behavioural outcomes, and may fail to assist some clients.

The benefits of advice are not distributed uniformly among clients. There is evidence that vulnerable or low-resourced clients can benefit most[208, 74, 177, 130].

Having quality standards ensures that all IAG planning, and delivery aspects are covered as part of the assessment process. Some authors highlight key challenges[215, 192, 98]. For example, the environment or circumstances of delivery may undermine provision andthe resources available to the service may not match the demand. A challenge for a quality standard is not only to define quality, but also to decide whether the circumstances of delivery allow the organisation to sustain quality. This may be a problem that is insoluble in principle, since realistically the quality assessment cannot be continuous, nor are too-frequent revisions practical. But some practical consideration of quality factors - minimum standards - does need to be in place.

Building evidence of outcomes

Webster et al [217]illustrate the difficulties of comparing programmes and of measuring performance in studies of IAG and related services in prisons, but it is not clear from his work that these are insurmountable.

But valid research designs and methods are available. Purdon et al [180] showed through a large scale randomised controlled trial of IAG for vulnerable groups, that the tested interventions had little or no effect for some groups and may have harmed others. If we follow Plant [174], such important findings are likely to be missed. Whelan et al [218] give an example of a suitable design for randomised controlled trials. The Irish Republic's Distance Travelled Toolkit[122] has used rigorous study to develop a toolkit that enables services to measure progress of their individual clients through successive 'soft outcomes' in complex social settings.

The impact of career counselling on beneficiaries is critically discussed, with supporting hard data by Brown[34], who said

> *"I recommend that we routinely begin to analyse outcome data for clinical significance".*

To do so can contribute to better understanding and enhanced quality.

Issues To Consider

Unobserved differences between groups or individuals can account for outcomes where IAG input is supposed to be effective or to have failed[136].

Even in well-regulated professional settings such as schools, IAG can fail in its goals: the setting is not a guarantee[98, 31].

The source of any disbenefit is not always apparent. Williams and Birkin,[221] describing interventions between advisor and client, shows how poor communication may produce poor results even when driven by good intentions, citing the concept and use of 'barriers' in counselling.

Practitioners may over-estimate the impact of their service and have been shown to value of elements of service differently from clients[18, 120, 223].

The possibility of allocation harms and representational harms arising from artificial intelligence (AI) applications has been noted above.

The advantages and difficulties of reliably selecting clients who could benefit from a services are reported in the literature[61, 187, 176]. Some IAG services have clients referred to them and some are under obligations to attend; in other cases, where clients are voluntary participants, it may be that their need is less than that of people who do not volunteer but could benefit. The uncertainties have given rise to 'deadweight'[170, 74] (outcomes which would have happened in the absence of the service), 'unobserved heterogeneity' (differences between individuals that affect outcomes but are unknown to the service), and to practices such as 'parking' (giving minimal support to individuals believed to be unlikely to have a successful outcome), and 'creaming' (deliberately seeking clients from the 'deadweight' group, to achieve higher outcomes)[15]. These practices may be unintended but have deleterious consequences. If intended, they are unethical. The limited evidence on creaming and parking suggests that there is a complex interaction between client, advisor and management practices that can encourage or avoid such behaviours. This interaction is discussed below in Section 10.

The independent literature review has not found direct and reliable evidence of services that deliberately offer sub-standard services to gain advantage. Tension between commercial goals or financial constraints and service standards could (and may) contribute to some of the problems mentioned[15].
The issues can arise from

- the complexity of the social environment and of IAG's goals
- a culture of assuming that the given intervention is better than no intervention
- difficulty measuring outcomes, compounded by the cost of running comparative trials
- the uniqueness of clients, the diversity of groups of clients, and
- the difficulty in finding policies that are uniformly successful
- inappropriate incentives or demands on organisations or advisors[15, 32, 176].

Not all high-quality services produce uniform results. IAG services can usefully examine the distribution of the benefits they offer, and whether or how equity is served among their clients

A way forward

The circumstances described above suggest that IAG provides benefits for many, but not always for all. It seems sensible, though there is no direct evidence, that the **matrix Standard** and other frameworks such as the Gatsby Benchmarks help to mitigate losses. It would be a step forward for there to be positive recognition in **matrix** for organisations that are aware of the possible problems and take achievable steps to overcome them. How might that be done?

As a minimum, maximising benefits requires ethical choices, underpinned by

- active monitoring and analysis
- leadership and front-line staff that are aware of problems
- awareness throughout the organisation
- means for issues to be raised by staff and by clients.

Quality factors that could apply might include:

- Attention to clients' individual circumstances
- Increasing the skills of IAG advisors
- Seeking feedback and data equally from unsuccessful and successful clients.
- Using comparison groups to measure
    - differential distribution of beneficial outcomes among clients
    - service impacts compared to counterfactuals
    - deadweight
    - impact of working practices.

These standards would contribute to measurement of quality, and planning of responses. While reaching a rigorous scientific standard would be costly and difficult for many services, reaching a lesser but still informative standard would encourage services towards a constructively self-critical approach from which service improvements can be launched.

9 Service planning, implementation and review

The **matrix** Standard currently includes guidance on service development, under the rubric 'Plan, Do, Review' (PDR). There are numerous variations the PDR framework that the **matrix Standard** could adopt, but the evidential links between quality services and planning, action and review are weak and mainly theoretical, or opinion based. None of the reviewed studies provide definitive evidence that one or another model stands out as uniquely appropriate for IAG. But the volume of 'expert-opinion' literature on business change and quality management is great. It appears that **matrix** applicants could adopt almost anyone, or some combination of models, and it is clear that the Plan-Do-Review model is a structural foundation for every other model. But there is scope for additional criteria, which might appear in the **matrix** Elements, in guidance, or in assessment. Expanding, refining and implementing PDR relies on:

- choosing and including suitable models for the specific service
- choices guided by the domain of IAG
- choices which conform to and help implement the other quality criteria of the Standard.

Causal links between management decisions and outcomes and processes need to be examined in the PDR process - for example, how do advisor targets or advisor training result in more or better outcomes? Certain models, such as Theory of Change (ToC) and Behaviour Change Wheel (BCW) encourage such analysis by engaging as many participants or contributors as possible and by evaluating the chain of causality from resources to intervention to outcomes to social goals.

LSC evaluation guide

The Learning and Skills Council provides guidelines [137] for both internal and external evaluation of IAG provision. Their 'Evaluating IAG: A guide for nextstep delivery networks' is an example of an approach that could be used as a guide to applicants and as a resource for assessors. It includes advice on:

What Information to Collect
Approaches to Evaluation
Evaluation Plan
Types of Evaluation
When to evaluate
Who should undertake an evaluation?
Guidelines for self-evaluation and for external evaluation
Commissioning and using consultants
Evaluation Techniques
Qualitative and Quantitative Approaches
Research Methods
Sampling Survey methods
Interview techniques
Questionnaire design
Focus groups
Mystery shopping and
Reporting and Dissemination

The OFSTED Education Inspection Framework

The Ofsted Education Inspection Framework[165] relates to inspections carried out, respectively, under section 5 of the Education Act 2005 (as amended), section 109 of the Education and Skills Act 2008, the Education and Inspections Act 2006 and the Childcare Act 2006.

The education inspection framework has been devised by Her Majesty's Chief Inspector for use from September 2019. It sets out the principles that apply to inspection, and the main judgements that inspectors make when carrying out inspections of maintained schools, academies, non-association independent schools, further education and skills providers and registered early years settings in England. The education inspection framework supports consistency across the inspection of different remits and reflects relevant legislation for each type of setting. It is accompanied by an inspection handbook for each of the four remits: (i) early years (ii) maintained schools and academies (iii) non-association independent schools (iv) further education and skills.
The OFSTED Framework is notable for its three over-arching themes which could apply to evaluation of any IAG provider:

- Intent
- Implementation
- Impact

Further detail is given in Appendix 4

The Treasury Green Book

HM. Treasury's Green Book: Central government guidance on appraisal and evaluation' sets out

> *"At every level of the decision-making process, whether it concerns strategic portfolios of programmes, a programme, or a project, there is a need to set out the logical chain of cause and effect by which the SMART objectives will be produced. The need for this is widely recognised and, in some places……it has been catered for by approaches labelled as logic models or the theory of change"*[200].

Theory of Change (ToC).

ToC includes 'top level' social goals, an approach implied in Watts[214]. ToC approaches are designed by those participating in the PDR process, to enact their own theory about how activities will lead to interim and longer-term outcomes, given the conditions that may affect them. ToC also involves people from all parts of the process and is compatible with client and customer input alongside that of management and front-line staff. In it the participants in the process define their theory about causes, influences and effects. This strengthens the attribution of change in outcomes to changes in delivery. Articulating a Theory of Change and gaining agreement on it by all stakeholders reduces, but does not eliminate, the problems associated with attribution of impact. Mayne[147] provides examples of standards that could be applied by **matrix** assessors:

> *"For a structurally sound ToC:*
>
> *1. Is the ToC understandable? ….. are causal link assumptions set out?*
> *2. Are the ToC results and assumptions well defined?*
> *3. Is the … sequence of results …plausible?*
> *4. Is the ToC logically coherent? ….*
> *5. Are the causal link assumptions necessary ….?*
> *6. ….*
> *7. Is the ToC generally agreed?*
> *8. Are the results and assumptions…measurable? What is the likely strength … of evidence?……."*

ToC requires consideration of high level, intermediate and proximate goals and actions, with supporting evidence at each level[50] and so is able to include consequences and ethical choices alongside practical means and desired goals. IAG is not free from political goals, nor from participation in political-social processes[59] so a higher-order view of PDR such as ToC is relevant[157].

Client and customer Input

The feedback and involvement of customers, clients, beneficiaries are widely held to be a valuable part of PDR Vilhjalmsdottir et al report that

> *"Quality assurance mechanisms need to be installed with an emphasis on user involvement"* and *"Channels of user involvement need to be established and capacity building or training of both professionals and users is an important precondition of successful user involvement."* [206]

Watts [216] agrees.

Involving clients in review and planning is possible[173] and can enhance the tailoring of services to need[115]. But getting users' views is not straightforward:

- engaging them and enabling them to contribute effectively may not be easy
- their ability to articulate and justify their views may be weak
- contributing to a better service may not be their priority, particularly if they have had a bad experience
- clients and users are usually not expert in the service they are discussing
- they may bring assumptions that run counter to the goals and working assumptions being used (see ToC, above), and
- the value of their input may be influenced by
    - bias in choice of clients (do they volunteer? What motivates them?)
    - bias in their responses, and
    - bias in the interpretation put on them.

That should not invalidate their input, but it does require effort to ensure it is both accorded real worth and examined critically. Despite the difficulties, a contribution by clients and users can highlight successes and weaknesses to be addressed. Including their fairly represented views may also go some way towards a reduction of the risk-of-harm considerations outlined above.

Quality Assurance Management

A Quality Assurance Management (QAM) model proposed in Governance for Quality Social Care in Scotland[194] lists key principles and duties of users and carers, managers and leaders that are relevant to PDR, though not definitive. These include:

- involving service users / carers and the wider public in the development of quality care services
- ensuring safe and effective services
- appropriate staff support and training
- continuous improvement with effective polices and processes in place
- ensuring accountability and management of risk

Users and Carers

- contribute to planning as respected experts in their own life choices
- shape services and advise on quality through feedback and joint planning

Practitioners

- translate values into practice
- empower users to self-direct

- engage with assets & deficits
- balance needs, risk & civil liberties
- protect, maintains and improve standards through learning

Social Care Managers

- act as a conduit between organisational, managerial and professional expectations
- empower staff & support complex case management
- monitor standards using data sources & through supervision
- deliver on partnership aspirations

Leaders

- create optimal organisational culture of transparency; safety, continuous & critical incident learning; empowerment
- set & monitor strategic direction service priorities & standards
- work with elected members/CE/corporate team to rationalise & improve governance approaches.

Here we see an example of an inclusive approach to review and planning; and an example (there are many) of how difficult it is to establish objectively measurable criteria for quality.

The 'Drivers for Change' model (DfC)

DfC is widely adopted in many industries. It identifies internal (organisational) and external factors that provoke or resist change, and examines all aspects of the organisation, including

- the external environment,
- mission and strategy,
- leadership,
- culture,
- management,
- structure,
- systems,
- work units,
- task-related individual skills,
- motivations,
- individual needs and performance, and
- organisational performance.

As described in management literature, it often but not necessarily gives the highest importance to environmental, leadership, culture and mission strategy factors. It is not, however, specific to IAG, and would always benefit from inclusion of the IAG quality criteria (such as the importance of the client-advisor relationship, or the clients' input).

The 'Behaviour Change Wheel' (BCW)

BCW[151] is consistent with the IAG evidence on inter-personal skills and personal development and motivation as catalysts for behaviour change. It has mainly been used to support changes in public behaviour in health policy areas. According to BCW, for clients to change their behaviour, they must be capable, motivated and have the right opportunities. BCW helps planning and management to support the point-of-delivery by linking service design to personal 'Theoretical Domain Frameworks' (such as skills, memory, identities, beliefs intentions and many more...) and to client impact.

BCW is sometimes considered a sub-set or implementation of ToC, but this probably says more about the diversity of commentators than about any true hierarchy of models.

Qual-IMG

A model directly targetting IAG services was provided by the Qual-IMG Quality Development Framework[66, 158]. This is an elaboration of the PDR framework with detailed guidance on its implementation. Its process moves through commitment, analysis, goal definition and action planning, implementation, assessment of measures taken, and evaluation of results.
It covers

- Policy goals: social inclusion, equity, ethics
- Processes: customisation, relationships, open-ness and lack of bias or sanctions
- Practitioners: professionalism, competencies, CPD and reflection
- Outcomes: decision making competences, educational or labour market achievement, economic outcomes
- Clients: client centredness, customisation, protection of rights, avoiding conflicts of interest.

Qual-IMG includes high-level social goals, as does the ToC model. They may be compatible and could be used together.

The evidence does not show that any one of these models should be chosen above all others for the **matrix** Standard. But it does seem that ToC, BCW and Qual-IMG are relevant to IAG because they include all the aspects of delivery from social goals to client input. Among these three:

ToC is most adaptable to changing views about society, its goals and influences
BCW is most focussed on achieving healthy change for its clients
Qual-IMG is pragmatic, and results from study of IAG processes.

Finally, it seems reasonable that any further guidance on PDR should ask the **matrix** applicant how they apply the quality criteria in the **matrix** Standard during the review process.

10 Links between delivery for clients and supporting services

Advisors' working environment

There are direct links between the scope for advisors to provide effective, trusted professional support to clients, and the environment in which they work. These links are described in the literature and can be applied in the evaluation of the resources (of all kinds) that support and direct their advisory work. The working environment, in the widest sense, should support[181, 13]:

- front line autonomy for advisors so they can adjust processes and targets in order to respond to the client as an individual[214]. There is frequent agreement that practitioners working directly with clients need freedom and flexibility in how and how much they help their clients. Where they are overly restricted, by targets, procedures, regulation or resources, the relationship with clients suffers[176]. But their freedom should not extend to using coercive methods. Where there is potential for undesirable outcomes, the advisor should enable clients to make their own informed choices.
- continuity and time to build an effective relationships. Advisors cannot help clients towards autonomous and informed personal choices and plans, unless there is sufficient time and continuity of contact. How much time, over what period, varies greatly[169].
- training and skills, both through prior professional training and in-work progression and training contribute to clients' appreciation of their advisors[97].
- a separation between 'policing' and 'supporting' may help to build the relationship of trust between the client and the professional in the 'support' role. Where advisors have a role to support and also to 'police' or 'sanction', the supportive trusting relationship may be damaged. At the least, it requires a high level of skill on the part of the advisor to manage both these roles without failing in one of them. An example occurs in the institution of welfare sanctions within employability advice settings. Where separation of roles is not possible, the relationship with the advisor assumes even more importance[68].
- adequate resources. It is possible to gather good quality resources - both practical and intellectual - for use by IAG services and their use contributes to quality for clients[101].
- appropriate caseloads. The evidence on suitable caseloads for advisors is not helpful. It is shown that excessive caseloads mean clients do not get the quality or amount of support they need and that minimal caseloads are wasteful of advisory capacity[214]. Between these extremes, we must assume that suitable caseloads must be a matter for each service and should be considered in the review and planning processes.

Leadership

> *"Ambiguity and indeterminacy are inherent in IAG. A key challenge …. is how they are managed? This embraces both the need for a robust evidence base that informs organisational policy and practice, but also consideration of the organisation's culture and how it influences service delivery through the values and practices of employees."*[16]

There are many examples of leadership initiatives in the UK, many theories and many approaches, but some sensible scepticism about what leadership is:

> *"Most frameworks go beyond simple definitions of behaviours, to also consider some of the cognitive, affective and inter-personal qualities of leaders. Leadership is often conceived as a set of values, qualities and behaviours that encourage the participation, development, and commitment of followers."*

> *"The 'leader' is …. expected to display excellent information processing, project management, customer service and delivery skills, along with proven business and political acumen…. (and) … honesty, integrity, empathy, trust, ethics and valuing diversity. …there is little evidence in practice that the 'transformational' leader is any more effective than his/her alternatives."*[26, 5]

> *"The research has shown that strategic leadership and a holistic approach to careers and employability are most effective."* [220].

But what do 'strategic' and 'holistic' mean? Nowhere is it defined. Throughout the voluminous commentary on leadership, precise meanings are lacking and there is little agreement about how to characterise 'good' leadership. The evidence is weak:

> *"Whilst it has been argued that the leadership and management frameworks presented ..... may suffer from an over-emphasis on the individual leader, they may also suffer from a lack of research basis. For many of the frameworks little, if no information, was available on how they were developed, and it seems likely that no detailed research was conducted.* "[26]

The importance of leadership is widely recognised but descriptions are often given in general terms that do not refer to how leadership supports front-line provision of IAG services. The reason for this is not clear; it may be because leadership is supposed to have its own set of competencies, which are different from those of front-line service provision; where both are good, it is assumed that they work together to provide an effective service. But this is only likely to happen if the leaders are supportive of the front line. The Gatsby standards are a case in point: They say

> *"A Careers Leader needs to be a: LEADER – a good leader who takes responsibility for conceiving, running and reporting on the school's careers programme; MANAGER – a skilful manager who is able both to run projects and, in some cases, line manage more junior staff; COORDINATOR – a careful coordinator of staff from across the school and from outside; and NETWORKER – a skilled networker who is able to develop a range of links beyond the school with employers and education and training providers."* [81]

Commitment to results or outcomes is rarely enough on its own to define a quality service. The presence of 'strong and thoughtful'[97] leadership, sufficient resources and sound management can be compatible with services that face the problems identified in the section 'Securing the IAG benefits for clients', above. The application of the approaches set out (above) on self-efficacy, personal development, autonomy and informed decision-making are not to be assumed as automatic. They require the commitment of the leader(s).

Management

Advisors should have an 'enabling' relationship with their clients, albeit one in which hard reality is always present. Likewise, managers need to have an enabling relationship with the advisors they oversee. There are some general descriptions, though the IAG evidence is weak, showing that similar qualities describe the manager-advisor relationship[26]. Managers who support the **matrix** quality standards are likely to be more productive of successful services than those who do not. In this respect, the **matrix** Standard, being an 'umbrella' standard is surely right to ask leaders and managers to define their goals, measure their results and engage in a Plan-Do-Review process.

The evidence is less weak when it comes to the interface between management and service. Management style, the use of monitoring, controls and incentives (on advisors) are not value-free tools that work independently of the advisor-client relationship: they impact directly on the quality of service and on advisors' motivation and service delivery[176, 68].

Inappropriate use of numerical targets has been reported to have a negative impact on advisors' ability to deliver quality. Excessive focus on procedural requirements has been reported as preventing advisers from delivering a personalised service. Targets, incentives and business goals can produce perverse effects such as 'creaming', 'parking' and limiting the support offered to those most in need. In contrast, where management supports reflective practice, it may also encourage a high-quality service.

Where comparisons are made between advisors, managers should be aware of reversion (regression) to the mean (as exemplified in Lane et al[136]) as a factor influencing the allocation of incentives. Incentives for or on clients may also have counter-productive effects. VanParys reports that

> *"financial incentive is neither sufficient nor necessary for young clients to show up and partake; and the incentive should not be amplified with threats or guilt inducement..... An autonomy-supportive interaction style instead is necessary but not sufficient.... tailored offers/demands are required too."* [169]

The Money Advice Service provides guidance that is pertinent for the front-line provision and for service leaders in its Advice Quality Framework's "Reflective and Actioning" themes:

> *"Conduct self-evaluation when appropriate*
> *Share evidence-based practice with peers*
> *Reach out to other debt providers and other sectors to learn*
> *Facilitate learning and development to improve the quality of advice and skills levels of advisors*
> *Innovate and improve service delivery internally*
> *Gather and respond to client feedback*
> *Identify environmental changes and respond effectively."*[154]

In this light, it might be simplest to cut the Gordian knot, and simply ask that leaders and managers support the other, front-line quality factors that the **matrix** Standard asks for. The quality factors already include matters that are in the province of leadership: ethics, efficiency, effectiveness, evaluation and resource allocation.

Going further, one could with moral but not evidential justification argue that the leadership qualities of **matrix** accredited organisations should extend to espousal and promotion of a moral code or ethical position[17], such as for example, the Universal Declaration of Human Rights. To go beyond that and show how that position is realised in actual cases of moral or ethical complexity would be a valuable addition[201]. This approach is implicit in a few works. It appears be an inevitable concern when working to help people within the complex and ambiguous circumstances that often surround IAG.

Partnerships

Partnership working is noted by commentators and researchers as

- providing access to valuable services, resources and information
- reaching clients in their communities, gaining their trust and reaching excluded groups
- co-operating to meet the demands of contract provision and quality
- gaining economies of scale
- sharing resources such as accommodation or staff training
- contributing to effective working with disadvantaged or excluded groups
- service delivery (a co-ordinated local network of IAG and related services.[128, 204, 149]

An organisational culture of openness and cooperation between partners, commitment from participating organisations, transparency, clarity of objectives from the outset, proportionate governance, and suitably regular monitoring, are essential[55].

> *"Networking and building close partnerships with other organisations are essential to the success of the [USDAW] programme."*

Co-location, cross-service co-operation and inter-service referral (as examples, Mental Health Support to Housing, or between Careers IAG and youth workers and community mentors)[215] are all reinforced, and

> *"Arrangements that involve local partners can have the double advantage of benefiting from expert advice from other agencies and also strengthening the referral network"*[97]

Partnerships with employers are relevant for all kinds of employment focussed IAG[109, 96, 124]. They may be formalised through longer term agreements and co-operative arrangements, or highly flexible and informal local co-operation:

> *"While national statistics can provide the basis for understanding labour market trends, employers' cooperation is fundamental for understanding local occupational realities and their possible futures"* [10]

> *"Effective delivery of employer engagement within career guidance will be authentic, commonplace, valued by young people, varied by activity, contextualised with professional guidance, personalised and begun at pre-secondary level."*[156]

But employer links are not confined to employment focussed IAG:

> *"If my tenants are in work, they pay the rent and don't need as much support."* (Supported housing provider - personal communication).

Partnership working requires commitment and understanding at all levels of the pairing organisations. There are often differences of approach, resources, culture, methods and aspirations between partner organisations, and these differences need to be understood and managed if friction is to be avoided[95]. Where partnerships are effective, they should enable the advisors to work in the best way possible, and not introduce ambiguities or impose unnecessary work complications. The understanding of the management on both sides is a valuable asset in ensuring this.

Networks and networking

The literature identifies three kinds of network for IAG. In each case the concept of 'network' includes both personal contacts, and inter-organisation or inter-social group co-operation. There is substantial overlap in the categories listed below: they are not 'natural' categories, and organisations may play multiple roles, including offering their own IAG provision in addition to any direct resource provision.

Several studies refer to advisor's ability to co-operate in their local service networks: IAG advisors need to be competent to work in these networks; their organisations need to be resourced and connected to support the advisors and clients. However, the literature does not provide much in the way of guidance as to quality factors in networks and partnerships.

Networks of services that can provide support to clients.

> These provide support that complements the work of advisors: vocational training services, social services, housing associations, healthcare, therapeutic counselling

are examples. Outside the public sector, banks provide support, albeit rudimentary and focussed on business outcomes, for indebted account holders; NGOs provide personal support as for instance the Citizens' Advice Bureaux, and specialist services for disabled and disadvantaged groups.

Networks that provide resources and opportunities for clients.

The most cited and obvious are employers and, in the careers field, Further and Higher Education. Other kinds of networks and organisations are relevant in other fields: sources of welfare support (e.g., DWP), banks and lending institutions, health care providers and rehabilitation services are examples.

Social networks to which clients belong.

These include family connections, peer-groups, recreational and friendship links, workplace and professional connections. These personal networks are immediately available and usually valued by clients, and their influence on IAG advisors is strong.

Where advisors are working with excluded or disadvantaged people, seeing them as needing to be 'mainstreamed' brings ethical issues and a requirement for clients' informed choice. To achieve this, advisors need to be able to work within each client's frame of reference. Andersson[4] links the personal skills and attitudes of outreach advisors to the complex situations, environments and social trust of hard-to-reach clients, speaking of

> *"outreach workers describe 'never to give up' as a central part of their work ethic and underline the importance of always being open for a new trial. In relation to people they meet, they want to emphasize the uniqueness in each individual and every situation, to make people feel 'seen.'"*

A further matter can be inferred from the evidence that advisors are most successful when they gain trust and build a professional working relationship with each client: the advisor's 'ethical stance' is important alongside their concrete skills. For it to be given adequate moral rein, leaders, managers, supervisors and support services should adopt the same stance.

For completeness, it could be argued that the evidence reviewed here is influenced by widespread cultural bias in the sample frames and is not a naturally occurring fact. What follows? We can argue from individual rights and from justice, that, as long as any element of coercion exists in the context of IAG, as it often does, then securing person-centred, humane IAG services is a matter of moral judgement, irrespective of the strength of evidence. Either way, the ethical stance taken by all the staff of the service has a direct impact on clients. The implications for leadership and other support services are clear.

The supporting services for IAG delivery enhance a quality service overall, when they

- provide adequate working resources & flexibility
- make only suitable and careful use of incentives, targets and rewards, avoiding perverse effects, and being alert to the possibility of wrong judgements
- encourage the 'what works and 'quality' factors that have been identified
- thoughtfully and fairly include user feedback and influence
- use networking and partnerships to support and enhance a) to e)
- do these things in the context of an ethical stance that applies to all parts of the organisation.

11 Quality descriptors for IAG that can be used in guidance to matrix applicants or applied in assessments.

This section brings together brief statements of the quality standards that might be applied, based on the evidence reviewed. The full list is attached at Appendix 5, and readers who wish to extend their understanding are also referred to the original sources.

As far as possible quality standards should be concrete and measurable; inevitably, some are less so, some because of lack of evidence, others because of their nature. Readers, **matrix** applicants and assessors should interpret the underlying principles or concepts in the context of their own service.

This list is not exhaustive. It is a response to the evidence and professional opinions that have been reviewed and carries the emphasis that follows from the topics that were identified for review. It should therefore be applied to the **matrix** Standard alongside its existing and more comprehensive standards.

The Advisory Environment

Advisors provide effective, trusted professional support to clients.
Advisors are supported with training and equipped with skills and knowledge.
Advisors are proactive in pursuing their client's case.

Client Support

Trust is established between client and advisor and organisation.
The service uses advanced communication skills to engage clients in exploration of their circumstances in relation to the service, with appropriate challenges and including social, cultural and family influences.
The client is supported towards enhanced confidence and self-efficacy.
The client is supported towards informed and autonomous decision making.
The client is enabled to make use of understood and accessible information.
The client is supported to make, review, adjust and execute personal plans of action.
The client is helped to develop appropriate skills, understanding, and broadened ideas.

Securing Benefits

The service:

- provides the support needed to achieve each client's goals, or if this is not possible, refers the client to an alternative service
- adapts to clients' gender, economic status, ethnicity, location, age, health condition, educational attainment, family status, citizenship or disability
- builds on clients' capacities, avoiding over-emphasis on problems
- reviews front-line service, management and interventions, using comparative groups, measures or trials, to aid judgements about effectiveness for clients.

Resources

The service

- has access to sufficient domain-appropriate knowledge and resources in relation to the goals and the intended outcomes

- provides support in personal, group or distance-advice modes according to the needs of clients and partners
- supports clients through their 'journey' as much as is needed to meet their goals
- manages caseloads with input from front-line staff and clients, to balance efficiency with effectiveness.

Networking And Partnership

The service and people in it:

- co-operates with other relevant organisations to facilitate IAG outcomes, and to share resources, information, contacts or expertise with transparency, clarity of objectives, and regular monitoring between participating organisations
- present services to clients and users in a seamless form, referring clients whose needs extend beyond the service's own competence.

Outcomes

The service:

- focuses on the desired outcome, accommodating the client's knowledge and awareness, capacity, skills, experience, and wishes
- accommodates social and cultural influences
- uses objective measurement to evaluate distance travelled
- has social goals with clear understanding of social, political, economic and cultural circumstances, supported by
- relevant clear, achievable, planned interventions and contributions to the goals.

Use of Information, Digital, Social and New technologies (IT)

The IT in use

- is suited to personal characteristics and circumstances of clients
- meets design, accessibility, usability and functionality standards
- supports or is compatible with the other standards listed in this section
- does not diminish the use of live, local and verified information
- does not lead clients to overvalue its authority.

Staff are trained in both IT systems and integration of IT in the service.

Limitations of IT services are allowed for in designing their use or application.

The service takes steps to ensure that IT and particularly social media are not undermined by inappropriate inputs.

Organisation

The service:

- includes client and customer input in the design and development of services
- records the advice given and the actions to be taken.

The service is competent: it uses

- policies that implement quality standards
- quality assurance processes based in the quality standards
- development or training to enhance staff competencies
- external and service information to respond to a changing environment.

The Plan-Do-Review Process

The organisation:

- reviews and plans for all aspects of its service, including
  - policy, values and societal goals
  - processes
  - people and practitioners
  - outcomes
  - clients and customers
- uses objective assessments to measure the achievement of goals and values through outcomes, where possible applying counterfactuals
- uses an evaluation, review, planning and implementation model that is relevant to (or has been tested / applied with success) the service and that addresses all the quality aspects of the service
- engages clients, customers, advisors and all staff in the process.

Although not definitively part of a quality standard, **matrix** applicants might be pointed to Qual-IMG, Theory of Change or Behaviour Change Wheel as examples of sound approaches to adopt.

Leadership and management

Leaders and managers should

- understand, develop and apply the **matrix** Standard and its quality descriptors
- encourage shared values and goals throughout the organisation
- understand and support the application of self-efficacy, personal development, autonomy and informed decision-making in the provision of a person-centred, humane IAG services
- understand and accommodate the ambiguity and indeterminacy inherent in IAG, and support their staff in working through it
- create a work environment in which advisors co-operate and identify with the goals and outcomes of the programme
- use and encourage evidence-based development and learning
- apply targets or rewards in ways that enhance the service to clients and support advisors' motivation and service delivery
- actively apply their ethical stance in cases of moral or ethical complexity.

Ethical Values

The organisation and the staff within it:

- have ethical values and show how they are implemented
- avoid unintended or negative consequence for any and all clients
- undertake active monitoring
- provide means for issues to be raised by staff or by clients
- work only with clients as long as they have given their informed consent.

Appendices

Appendix 1 The evidence, search terms and procedure

The sources, amount and quality of evidence

We reviewed 317 documents, of which 189 proved to have a direct bearing on the subject, whether as high-quality evidence, expert professional reviews and studies, or being important policy or conceptual documentation.

Along with Smith et al[193] this review found a shortage of studies that evaluate outcomes, whether controlled against counterfactuals (our highest rating) or merely stating outcomes without controls or counterfactuals. 30% of the studies were in these rating bands, 70% not. Only 16 studies employed controls.

But a wide consensus exists about what works, values to be applied, measurement of outcomes and quality standards in IAG. The consensus is dominated by careers IAG, but that specialism is not at odds with views from other domains.

	Included studies	*percent*	*Excluded studies*	*percent*	*All studies*
Controlled trial	16	8	1	1	17
Control by Calculation	8	4	8	6	16
Outcome with weak counterfactuals	3	2	2	2	5
Outcome without counterfactuals	29	15	16	13	45
Expert reviews	73	39	35	27	108
Expert-review based policy	43	23	15	12	58
Opinion studies	3	2	17	13	20
Other	14	7	34	27	48
Totals	189	100	128	100	317

Table 1: Number and quality of sources.

Terms of search

Types of service activities

IAG
Careers Guidance
Information in counselling and guidance
Occupational and life choices
Employment and Employability
Personal effectiveness
Substance abuse counselling
Counselling for social outcomes
Well-being & IAG

Aspects of Quality Standards

Standards
Assessment
Best Practice
Quality
Outcome

Effectiveness
Measurement
Harm or Risk

Use of IT, databases or automation
Resources

Sources

ERIC
ICeGS
ASSIA
PsychInfo
British Education Index

Researchgate
CODE
Google Scholar
Mandelay

plus, use of high-quality sources to identify additional sources.

Grading of Sources.

1. Trials with randomisation and control by counterfactuals
2. Trials with control by calculation
3. Outcome studies with weak counterfactuals
4. Outcome studies without counterfactuals
5. Expert / professional reviews
6. Expert-review based policy
7. Opinion studies

Restrictions.

English Language sources, post 2000, but some earlier sources of high quality are included.

Appendix 2 Examples of IT standards.

Applying similar standards in IT applications as in face-to-face interactions will support good quality in IT-based interactions. The literature provides examples:

"(1) the type and focus of content;
(2) the format of the learning experience;
(3) the interactive strategies;
(4) the role of the facilitator;
(5) the type of technology being used, and
(6) the kinds of support being provided.

…often overlooked, are the design parameters of technological based systems to deliver careers support. The six design components outlined above must be considered in the development of any system. " quoted in Bimrose et al [24]

Hooley et al [105] provide a list of "ten quality dimensions for online mentoring:

"1. Establish an appropriate relationship
2. Establish the purpose of the conversation
3. Provide information or links to resources
4. Encourage the mentee to explore their career goals
5. Prompt and relevant responses
6. Identify opportunities or explore ways to overcome barriers
7. Refer to appropriate services
8. Move the mentee progressively towards their goals
9. Encourage the mentee to reflect on their own strengths and weaknesses
10. Bring the process to a mutually satisfactory close"

Other papers focus on the qualities in a broader sense, and list:

- effectiveness
- acceptability
- usability
- accessibility
- relevance
- provision of targeted and personalised information
- accuracy
- impartiality
- clarity about purpose and limitations
- confidentiality and safeguarding [163, 205, 191, 228]

Siau and Wang[190] give examples of the factors leading to trust in AI systems:

- representation (the appearance or human-like quality of the system).
- image/perception by users
- reviews from other users.
- transparency and "explainability." (what's it doing?)
- trialability (the opportunity for people to have access to the ai application and to try it before accepting or adopting it)
- usability and reliability.
- collaboration and communication.

- sociability and bonding.
- security and privacy protection.
- interpretability.
- job replacement.
- goal congruence. (Making sure that AI's goals are congruent with human goals)

and they note that "*Ethics and governance of artificial intelligence are areas that need more attention*". Sillence et al [191]conclude that "*Credibility and impartiality continue to be key predictors of trust in eHealth websites.*"

Appendix 3 The Gatsby Benchmarks

12 A stable careers programme

Activities should include assemblies; enrichment activities; tutor time; PSHE; employer encounters; workplace experiences.

Benchmark and CEC criteria	What to look for
Every school should have an embedded programme of career education and guidance that is known and understood by students, parents, teachers, governors and employers. ➢ Every school should have a stable, structured careers programme that has the explicit backing of the senior management team and an appropriately trained person responsible for it. ➢ The careers programme should be published on the school's website so students, parents, teachers and employers can access and understand it. ➢ The programme should be regularly evaluated with feedback from students, parents, teachers and employers as part of the evaluation process.	The extent to which schools and colleges: 1. have a named careers leader 2. have a careers plan published on their website 3. ensure all stakeholders aware of it 4. keep it up to date 5. take advice from the governing body to ensure that the programme considers their knowledge of the changing labour market 6. appoint a lead or coordinator with sufficient status and expertise to maintain and develop a stable careers programme 7. ensure that the programme design and delivery is embedded in school structures and not invested solely in the goodwill of individuals 8. promote the importance of the careers programme to students, parents, teachers and employers so that they know what to expect and how they can contribute to its success 9. undertake regular evaluation of the programme with a clear intended purpose, for example, reports for the senior leadership team and the governing body should be used to inform future decisions about the programme.

13 Learning from career and labour market information

Information should include skills, career pathways and progression routes in the local labour market; job applications and interviews educational institutions, courses, qualifications, entry requirements and costs; professional bodies; employment sectors, employers, jobs, salaries and employment trends; jobs, training and apprenticeships; job demands and working life; and financial planning.

Benchmark and CEC criteria	What to look for
➢ All students and parents should have access to high-quality information about future study options and labour market opportunities. They will need the support of an informed adviser to make best use of available information. ➢ By the age of 14, all students should have accessed and used information about career paths and the labour	1. The extent to which schools and colleges: 2. check they are making good use of resources including LMI available on Careers.com and via the EAN, JCP etc. 3. review their website and learning resource centre to ensure they cover all routes and engage the interests of students and parents. 4. start early so that young people and their parents have a good amount of time to explore

market to inform their own decisions on study options. ➢ Parents should be encouraged to access and use information about labour markets and future study options to support their children.	opportunities and build full and realistic pictures of the job market. 5. Ensure events and parents' evenings explain and promote the full range of opportunities in an impartial way 6. Draw on JCPs school advisers to come in to talk to pupils, parents and staff about local LMI and apprenticeships. 7. Train older students to support younger colleagues to make use of key careers information resources. 8. Make use of a wide range of media to encourage students in their career exploration including social media, posters, websites and physical resources. 9. Develop a careers assembly plan that identifies careers information topics appropriate for each year group.

14 Addressing the needs of each pupil

Resources may include Local Authority destinations data; Compass tool and/or Compass+, Unifrog, START etc.

Benchmark and CEC criteria	**What to look for**
➢ Students have different career guidance needs at different stages. Opportunities for advice and support should be tailored to each of these stages, with diversity and equality embedded in the school's careers programme. ➢ A school's careers programme should actively seek to challenge stereotypical thinking and raise aspirations. ➢ Schools should keep systematic records of the individual advice given to each student and subsequent agreed decisions. ➢ All students should have access to these records to support their career development. ➢ Schools should collect and maintain accurate data for each student on their education, training or employment destinations for at least three years after they leave school.	1. The extent to which schools and colleges: 2. use the Compass evaluation tool to assess how well existing provision meets the needs of all students. 3. review the learning goals, mind-sets and skills their students need for progression. 4. explore destinations figures for key stage 4 and post-16 students and identify any deficits in take up of pathways, subjects or courses that could be addressed by better tailoring of the careers programme. 5. consult with your students about what they see as the most important barriers in making good post-school progression. 6. ensure that their careers programme contains specific plans for groups of students who need tailored support to make effective career transitions. 7. identify careers programme providers who can support the enhancement of their programme. 8. develop and maintain systems for recording individual advice and careers interventions given to each student.

	9. help students to be proactive career managers by maintaining their own records of career development. 10. collect and maintain accurate data for each student on their education, training and employment destinations after they leave school. 11. Use your information on student destinations to draw together a list of alumni who can support your careers and enterprise programme.

15 Linking curriculum learning to careers

Providing career learning as a subject in its own right: in this approach careers content is delivered as a discrete curriculum, e.g., careers education or as part of PSHE; Incorporating career learning within other subjects; and organising career learning through co-curriculum activities.

Benchmark and CEC criteria	**What to look for**
All teachers link curriculum learning with careers. ➢ Science, technology, engineering and mathematics (STEM) subject teachers highlight the relevance of STEM subjects for a wide range of future career paths. ➢ By the age of 14, every student has had the opportunity to learn how the different STEM subjects help people to gain entry to a wide range of careers. ➢ All subject teachers emphasise the importance of succeeding in English and maths.	The extent to which schools and colleges: 1. identify the subject areas or teachers that can pilot this work and use their success to bring other teachers and curriculum subjects on board. 2. 'Careers in the curriculum, what works?', provides guidance on the range of interventions. 3. existing priorities and workloads can be overcome, once teachers get going. 4. take up the offer of ideas from Enterprise Advisers and Enterprise Coordinators. 5. find inspiration in various case studies and resources highlighting good practice, such as those from the Gatsby Foundation, CEC or Forum-Talent Potential websites. 6. encourage teachers to make their previous experience and expertise available to students, try to build a positive culture of applied learning. 7. identify curriculum hotspots by scanning national curriculum subject specifications and spotting opportunities to develop careers-related content. 8. avoid overloading career-relevant lessons with too many learning objectives and be aware of the danger of choosing contexts that over-complicate subject learning. 9. take advantage of any collaborative arrangements, such as the school's

	membership with a consortium or multi-academy trust, to develop approaches jointly.

16 Encounters with employers and employees

Employers and schools work together in creative ways to ensure students build a rich picture of the world of work and are well prepared to take up workplace opportunities. Schools provide first-hand encounters with employers as part of careers and enterprise programmes for years 7 to 13 and celebrate these links in their prospectuses and on their websites.

Benchmark and CEC criteria	**What to look for**
Every student should have multiple opportunities to learn from employers about work, employment and the skills that are valued in the workplace. ➢ Students should participate in at least one meaningful encounter with an employer every year between years7-13. ➢ Work with your regional LEP to make sure you are aligning to the strategic economic plan of the region.	The extent to which schools and colleges: 1. conduct an audit of the existing range of employer contacts and consider how well this meets the learning needs of students in every age group. 2. gather feedback from students about their employer contacts. 3. investigate practice in other schools and how careers programme providers and registered careers practitioners can support development. 4. draw up a development plan linked to the careers and enterprise policy and your overall school development plan. 5. in collaboration with teaching staff, implement the plan for building the scale and range of employer contacts through the careers and enterprise programme. 6. support the continuing professional development of staff through programmes such as the Career Leadership Certificate and attendance at events. 7. help students to record their learning and insights either as part of their student journals, or linked to overall school recording systems, such as PiXL Edge. 8. make sure parents are aware of their employer contacts and support them to talk to their children about the learning and insights they gather. 9. celebrate success by bringing in alumni and promoting details of events and activities to the wider school community, supported by organisations like Future First. 10. ensure there is proper preparation and debriefing from employer encounters.

17 Experiences of workplaces

Younger students and students explore careers and the world of work, relate their learning to the real world and develop their employability skills. Post-16 students, especially those in technical education, focus on activities closely aligned to their study programmes.

Benchmark and CEC criteria	What to look for
Every student should have first-hand experiences of the workplace through work visits, work shadowing and/or work experience to help their exploration of career opportunities and expand their networks. ➢ By the age of 16, every student should have had at least one experience of a workplace, additional to any part-time jobs they may have. ➢ By the age of 18, every student should have had one further such experience, additional to any part-time jobs they may have.	The extent to which schools and colleges: 1. build on staff and local contacts to establish strong and sustainable relationships with employers. 2. Manage their links with employers effectively – e.g., timely arrangements and the good matching of students to placements. 3. make sure that students and employers are clear about the purpose of the activities 4. ensure that preparation of students goes beyond just spelling out the essential practical arrangements to cover potential learning opportunities. 5. ensure a full debrief takes place with the student to help them understand the learning outcomes from their placement. 6. ensure that staff support students during placements 7. provide students with structured opportunities to reflect on their activities (The difference between 'having an experience' and 'learning experientially'.) 8. monitor the participation of individual students to ensure a balance between support for their current thinking and challenging them to explore opportunities they have not considered previously. 9. assess the impact of their scheme on equality, diversity and inclusion. .

18 Encounters with Further and Higher Education

Schools have a multi-pronged approach to ensure students are well-supported to choose pathways they value post-18. They start this work long before students reach the point of decision as evidence shows that raising aspirations and building resilience is effective from year 7 or earlier.

Benchmark and CEC criteria	What to look for
All students should understand the full range of learning opportunities that are available to them. This includes academic and vocational routes and learning in schools, colleges, universities and the workplace.	1. For programmes of support to be successful, they need to start in key stage 3. A useful rule of thumb is to inspire students in years 7-9, reinforce key messages in years 10-11 and prepare students for making their choices in years 12-13.

➢ By the age of 16, every pupil should have had a meaningful encounter with a provider of the full range of learning opportunities. ➢ By the age of 18, all students who are considering applying for university should have had at least two visits to universities to meet staff and students.	2. Avoid making judgements about the prestige and status of different pathways and providers in case you unwittingly influence your students inappropriately. 3. School budgets are tight but engaging in these activities are more people intensive than cash intensive. Make sure to look at what you can achieve with the resources you have. 4. Track destinations of leavers over 3 to 5 years using a combination of quantitative data (to pick up on trends) and qualitative data (to pick up on stories). This will allow you to plan for the future. 5. See how the National Collaborative Outreach Programme (NCOP) supports target wards in each catchment area to promote higher education to students from disadvantaged backgrounds

19 Personal guidance

The school or college offers personalised support tailored to students' needs and abilities. The advice is impartial and always in the best interests of the young person. It has an observable impact on their career and progression.

Benchmark and CEC criteria	**What to look for**
➢ Every student should have opportunities for guidance interviews with a Careers Adviser, who could be internal (a member of school staff) or external, provided they are trained to an appropriate level. ➢ These should be available whenever significant study or career choices are being made. They should be expected for all pupils but should be timed to meet their individual needs. ➢ Every student should have at least one such interview by the age of 16, and the opportunity for a further interview by the age of 18.	The extent to which schools and colleges: 1. ensure that they have a clear analysis of the guidance needs of their students and how professional Careers Advisers can support their careers and enterprise programme. 2. check that their plans meet the DfE statutory requirement students from years 8 to 13 have access to independent and impartial careers guidance. 3. ensure that they have a sustainable approach to funding careers guidance and a clear ongoing accountability for management and review. 4. compare approaches with other schools in their area and identify any opportunities for collaborative arrangements. 5. make sure the organisation they are commissioning is high-quality and **matrix** accredited – or the Careers Quality Mark 6. choose Careers Advisers who hold a level 6 or higher careers qualification, such as the Qualification in Careers Development (QCD) or equivalent, or the work-based Diploma in

	Career Guidance and Development, who subscribe to the CDI Code of Ethics and have a valid DBS check. 7. monitor and review the services offered, including gathering feedback from parents and students. 8. with individual agreement, integrate records from careers interviews into student reporting systems so that tutors can support ongoing career planning. 9. build intensive, wrap-around support for your more vulnerable students through mentoring and other programmes.

Appendix 4 The Ofsted Education Inspection Framework

The Ofsted Education Inspection Framework relates to inspections carried out, respectively, under section 5 of the Education Act 2005 (as amended), section 109 of the Education and Skills Act 2008, the Education and Inspections Act 2006 and the Childcare Act 2006.

The education inspection framework has been devised by Her Majesty's Chief Inspector for use from September 2019. It sets out the principles that apply to inspection, and the main judgements that inspectors make when carrying out inspections of maintained schools, academies, non-association independent schools, further education and skills providers and registered early years settings in England. The education inspection framework ('the framework') applies to the inspection of different education, skills and early years settings to ensure comparability when learners move from one setting to another. It supports consistency across the inspection of different remits. The framework reflects relevant legislation for each type of setting. It is accompanied by an inspection handbook for each of the four remits: (i) early years (ii) maintained schools and academies (iii) non-association independent schools (iv) further education and skills.

The Ofsted Education Inspection Framework overview is presented below:

- Introduction
- Principles of inspection and regulation
  - A force for improvement
  - Helping to protect learners
  - The Equality Act 2010
  - Expectations of inspectors
  - Expectations of providers
  - Provision inspected under the education inspection framework
  - The grading scale used for inspection judgements
  - Judgements made by inspectors
  - Overall effectiveness
- Key judgements
- What inspectors will consider when making judgements
  - Quality of education
  - Intent
  - Implementation
  - Impact
  - Behaviour and attitudes
  - Personal development
  - Leadership and management
- Arrangements for different types of provision
  - Early years
  - Non-association independent schools
  - Schools with sixth forms
  - Settings with residential and boarding provision
  - Further education and skills provision

Inspectors will make a judgement on the quality of education by evaluating the extent to which:

Intent

- leaders take on or construct a curriculum that is ambitious and designed to give all learners, particularly the most disadvantaged and those with special educational needs and/or disabilities (SEND) or high needs, the knowledge and cultural capital they need to succeed in life
- the provider's curriculum is coherently planned and sequenced towards cumulatively sufficient knowledge and skills for future learning and employment
- the provider has the same academic, technical or vocational ambitions for almost all learners. Where this is not practical – for example, for some learners with high levels of SEND – its curriculum is designed to be ambitious and to meet their needs
- learners study the full curriculum. Providers ensure this by teaching a full range of subjects for as long as possible, 'specialising' only when necessary.

Implementation

- teachers have good knowledge of the subject(s) and courses they teach. Leaders provide effective support for those teaching outside their main areas of expertise
- teachers present subject matter clearly, promoting appropriate discussion about the subject matter they are teaching. They check learners' understanding systematically, identify misconceptions accurately and provide clear, direct feedback. In doing so, they respond and adapt their teaching as necessary, without unnecessarily elaborate or differentiated approaches over the course of study, teaching is designed to help learners to remember in the long term the content they have been taught and to integrate new knowledge into larger concepts
- teachers and leaders use assessment well, for example to help learners embed and use knowledge fluently or to check understanding and inform teaching. Leaders understand the limitations of assessment and do not use it in a way that creates unnecessary burdens for staff or learners
- teachers create an environment that allows the learner to focus on learning. The resources and materials that teachers select – in a way that does not create unnecessary workload for staff – reflect the provider's ambitious intentions for the course of study and clearly support the intent of a coherently planned curriculum, sequenced towards cumulatively sufficient knowledge and skills for future learning and employment
- a rigorous approach to the teaching of reading develops learners' confidence and enjoyment in reading. At the early stages of learning to read, reading materials are closely matched to learners' phonics knowledge.

Impact

- learners develop detailed knowledge and skills across the curriculum and, as a result, achieve well. Where relevant, this is reflected in results from national tests and examinations that meet government expectations, or in the qualifications obtained
- learners are ready for the next stage of education, employment or training. Where relevant, they gain qualifications that allow them to go on to destinations that meet their interests, aspirations and the intention of their course of study. They read widely and often, with fluency and comprehension.

Appendix 5 Recommended Quality Descriptors

The Advisory Environment

Advisors provide effective, trusted professional support to clients:

- there is adequate front-line autonomy for advisors to respond flexibly and adjust the professional relationships to client and partner / network needs
- there is adequate continuity and time to build an effective relationship between the client and their advisor
- advisors are trusting and respectful towards their clients.

Advisors are supported with training and equipped with skills and knowledge

Advisors are proactive in pursuing their client's case.

If the advisor required to both 'police' and 'support', measures are in place to build the relationship of trust between client and advisor.

Client Support

Trust is established between client and advisor and organisation.

The client is supported towards informed decision making

- the client is sufficiently supported to make informed choices
- the intended goal or outcome is decided by the client with the support of their advisor
- the client is supported and enabled to explore their options through suitable discovery and challenge
- the client is enabled to make use of understood and accessible information
- the client is helped to make practicable decisions
- the client's choice may or may not be aligned with the purpose of IAG.

The client is supported to make, review, adjust and execute personal plans of action

- based on their own choices and capacities and applying self-efficacy principles
- building capabilities at a pace that suits the client
- resourced with examples, models, training / skilling / experiences and social support
- encouraging increased self-confidence, positive attitudes, and reduction of ambiguity or confusion.

The client is helped to develop new skills, understanding, and broadened ideas.

The service uses advanced communication skills with clients. It:

- uses expert communication to engage clients in exploration of their circumstances in relation to the service
- provides appropriate challenges to clients, without undermining their progress or confidence
- considers, includes and applies social, cultural and family influences.

Securing IAG Benefits for clients

The service:

- responds to each client's needs, providing services to those who need it, not to those who don't
- provides the support needed to achieve each client's goals, or if this is not possible, refers the client to an alternative service
- recognises and adapts to clients' gender, economic status, ethnicity, location, age, health condition, educational attainment, family status, citizenship or disability
- builds on positive aspects of client capacities, seeking solutions and avoiding over-emphasis on problems or barriers

- reviews provision of direct contact with clients, its management and the quality of interventions, to judge their effectiveness for clients
- uses comparison groups or measures, or comparative trials, to form judgements about effectiveness.

Resources

The service:

- has access to domain-appropriate knowledge and resources
- has sufficient resources in relation to the goals and the intended outcomes
- provides support in personal, group or distance-advice modes according to the needs of clients and partners
- provides enough time with clients to achieve progress
- supports clients through their 'journey' as long and as much as is needed to meet their goals
- manages caseloads with input from front-line staff and clients, to balance efficiency with effectiveness.

Networking And Partnership

The service and people in it:

- co-operate with other relevant organisations. They:
  - co-operate to facilitate the IAG outcome
  - co-operate to acquire or share resources, information, contacts or expertise
  - provide transparency, clarity of objectives, proportionate governance, and regular monitoring between partners and participating organisations
  - resolve differences of approach, resources, culture, methods and aspirations between partners;
- present services to clients and users in a seamless form. They:
  - refer clients whose needs extend beyond the service's own competence
  - engage with customers or service-partners to enhance knowledge and understanding of the client's local environment
  - engage with social networks to which clients belong
  - engage with networks that provide access, support, resources, insights and opportunities for clients.

Outcomes

The service:

- focuses on the desired outcome:
  - recognises the client's knowledge and awareness, capacity, skills, experience, and wishes
  - recognises and accommodates social and cultural influences
  - helps clients to
    - value the service's outcome goals
    - explore, widen and challenge their understanding
    - think constructively, to avoid unhelpful thinking
    - identify next steps and a future plan
  - provides usable and useful resources
- uses objective measurement to evaluate outcomes and / or distance travelled

- has social goals with clear understanding of social, political, economic and cultural circumstances, supported by
- applies relevant clear, achievable, planned interventions and contributions to the goals.

Use Of digital IT

The IT in use:

- is suited to the age group and personal characteristics and circumstances, of clients
- is not used with clients who cannot, do not wish to, or are fearful of its use
- is compatible with face-to-face service standards and delivery
- meets design, accessibility, usability and functionality standards for
  - effectiveness
  - acceptability
  - usability
  - accessibility
  - relevance
  - provision of targetted and personalised information
  - accuracy
  - impartiality
  - clarity about purpose and limitations
  - confidentiality and safeguarding.

Staff are trained in both IT systems and integration of IT with the advisory service.
Use of IT does not diminish the use of live, local and verified information.
Use of IT or blended IAG supports or applies the full range of standards listed here.
Use of IT does not lead clients to overvalue its authority.
Limitations of IT services are allowed for in designing their use or application.
The service takes steps to ensure that IT and particularly social media are not undermined by inappropriate inputs.

Organisation

The service

- includes client and customer input in the design and development of services:
  - provides opportunities for systematic and objective client-feedback
  - shows evidence of adapting services in relation to clients' needs
  - records and identifies clients' needs
- records the advice given and the actions to be taken.

The service is competent. It uses:

- development or training to enhance staff competencies
- policies that implement quality standards
- internal quality assurance processes with
  - objective measures of quality
  - monitoring and evaluation arrangements
  - client process, outcomes and service data
  - benchmarking of provision
- external and internal service information to respond to a changing environment.

The Plan-Do-Review Process

The organisation and service:

- reviews and plans for all aspects of its service, including
  - policy, values and societal goals
  - processes
  - people and practitioners
  - outcomes
  - clients and customers
- uses objective assessments to measure the achievement of goals and values through outcomes, applying counterfactuals where possible
- uses an evaluation, review, planning and implementation model that is relevant to (or has been tested / applied with success) the service and that addresses all the quality aspects of the service
- engages clients, customers, advisors and all staff in the process.

Leadership and management

Leaders and managers should:

- understand, develop and apply the **matrix** Standard and its quality descriptors
- encourage shared values and goals throughout the organisation
- understand and support the application of self-efficacy, personal development, autonomy and informed decision-making in the provision of a person-centred, humane IAG services
- understand and accommodate the ambiguity and indeterminacy inherent in IAG, and support their staff in working through it
- create a work environment in which advisors co-operate and identify with the goals and outcomes of the programme
- use and encourage evidence-based development and learning
- apply targets or rewards in ways that enhance the service to clients and support advisors' motivation and service delivery.
- actively apply their ethical stance in cases of moral or ethical complexity.

Ethical Values

The organisation and the people within it:

- have ethical values and can show how they are implemented
- avoid unintended or negative consequence for any and all clients
- undertake active monitoring
- provide means for issues to be raised by staff or by clients
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