



**Bitesize Guidance**  
**DfES**  
**Final Project Report**

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# 1. BACKGROUND TO THE PROJECT

## **‘Bite-Sized Guidance’**

*‘A method of guidance which enables clients to self evaluate their progress, delivered through short interventions under rural outreach methods’*

The project was devised by three colleagues; the IAG manager (at the time), the Telephone Helpline manager (at the time) and the Business Development Manager. This bid was particularly important for North Yorkshire as in 2001 there were no other funded contracts offering guidance free at the point of access to adults across the county.

The following gives an outline of the thinking at the time

### 1.1 Local Context, Geographic / Socio-economic

North Yorkshire is England's largest administrative and predominantly rural county with a population of 561,400, 52% of whom reside in land areas categorised as sparse or super-sparse. People living in remote, rural upland areas of the county face issues of isolation, lack of effective transport facilities and difficulty in accessing support services and agencies. Research has shown that it costs more to provide services in widespread rural counties (Population Sparsity and the Personal Social Services the County Network 1998). The area combines prosperity as well as communities suffering relative poverty and rural disadvantage; in the rural uplands GDP per head is some 60% of the EU average. Wage levels are the lowest in Yorkshire & the Humber, at around 90% of the national average.

Rural isolation has been compounded by the impact of the recent foot and mouth problems and the BSE epidemic in the county. These have seriously affected the already declining agricultural industry upon which so many lower paid rural families depend.

North Yorkshire has also been affected by industrial decline; the number of coalfields in the Selby complex has steadily fallen since 1989 and will face total closure by 2009. Over 34% of the coalfield's male unemployed population tend to be older (over 45) and lower skilled. (Source: South Yorkshire Mining Advisory Service Information and NOMIS)

The Yorkshire Coast has pockets of acute deprivation similar to many inner cities. A number of the urban coastal wards, for example, Castle in Scarborough rank amongst the most deprived in England. (Source: Pieda, North Yorkshire Uplands Survey and DETR Indices of Deprivation)

Whilst the overall unemployment rate in the North Yorkshire is below national and region rates, this masks serious pockets of high unemployment Whitby (6%), Scarborough (7%), Selby (5.6%) (Source: NOMIS – February 2001).

There is growing evidence to support a mis-match between the skills of the rural population and employment opportunities. The York and North Yorkshire Employer Survey 2001 – shows that employers in Craven (50%) are most likely to report “hard to fill” vacancies with Ryedale (48%) followed by Scarborough (40%), reasons include: Over two-fifths of employers not being able to attract applicants with appropriate skills and experience. (Source North Yorkshire Learning and Skills Council)

## 1.2 Project Origins

Current provision in 2001/2002 prior to the project:

The DfES/LSC IAG programme has led to greater integration into the Community in information and advice work with diverse groups. But guidance needs remained unmet. Statistics collected by individual information and advice workers as part of the IAG programme in North Yorkshire identify 56 individuals (January 01 – September 01) as needing further guidance, but with no appropriate provision to refer to following the otherwise positive IAG intervention. It was anticipated that the number of adults in need and thus actual referrals would be significantly higher once a guidance service was in place.

In previous years, Guidance Workers funded by ESF Objective 3 have provided a service to groups in the Community especially active within the widening participation funding structure. Key partners operating in the Community, such as the Workers Educational Association (providers of an IT to Hill Farmers Course), identified a need for this level of guidance service to be resumed.

York & North Yorkshire Guidance Services had previous experience of providing 'free' guidance to individuals in the rural areas of North Yorkshire as part of an ESF Objective 5b funded project during 1999-2000. Demand for guidance activity increased significantly once the project was established in key rural locations. Once those funds became no longer available adults in rural North Yorkshire became disadvantaged once more.

Guidance was not equally available to all residents in North Yorkshire. Agencies with staff qualified to NVQ level 4 include York & North Yorkshire Guidance Services and the FE Colleges (Harrogate, Selby, and Scarborough).

York & North Yorkshire Guidance Services receives no public funding to provide universal guidance to adults. It has responded to demand by offering a priced service with a guidance interview currently costing £75. Within the SRB6 area in the coast and moors, funding has been won for one guidance worker to provide guidance for the low skilled and unemployed up to age 24 years. Guidance Services also contracts with Jobcentre Plus to provide guidance to eligible clients under New Deal 18-24 and 25+. Through the Connexions Service Contract guidance is available to young people up to 19 years of age and 25 year for those with special needs.

FE Colleges do offer guidance to prospective adult students as part of their admissions service, to existing full time students and depending on capacity to some part time students.

## 1.3 Barriers to Delivery

Securing sources of funding for guidance provision was the main barrier to delivery in the region. Patchy access to guidance existed on an ad hoc basis to individuals depending on their eligibility for funding streams and/or their ability to pay for provision. Access to guidance provision is a serious issue for those living in rural locations, as even when guidance has been funded it has usually only been economically delivered in the main towns thereby resulting in inequality of access for geographic reasons for example, an individual living in the remoter regions of the Craven area, such as Benthams, would have to travel up to 20 miles to access a guidance interview in Skipton and in addition to paying travel costs, may have to fund the provision themselves. Travel and transport difficulties have been further exacerbated by the foot and mouth epidemic thus further restricting access to guidance for rural residents. All these factors acted as significant barriers to adults in need of impartial help to assess re-training and career change options and a disincentive to individuals in accessing guidance.

## 1.4 Target Groups

Our aim was to provide a guidance service, free at the point of access, primarily to people aged 20 and over, in remote rural areas or other areas with poor transport links.

In addition, our partnership project's would target those in the other priority target groups resident in rural areas; and people with low, outdated skills both in the workforce and outside it; people in areas of high unemployment and social deprivation, such as Scarborough and older people in the more urban areas of North Yorkshire, including Selby and work with people with disabilities. Evidence had been given of need among these target groups. Work with partner agencies, including North Yorkshire County Council, Community Education Department and the Harrogate and Craven Carers Resource, through the IAG programme identified a specific need for guidance amongst under-represented groups in the community where the project would work within the Community to engage with these groups.

Our partnership projects would address barriers experienced by these groups including:

- Rural isolation, lack of local access to guidance and transport difficulties. By linking guidance to existing information and advice providers, and delivering a free service on an outreach basis. Funding and access to provision and lack of childcare facilities are most frequently cited as reasons for lack of participation in learning among all groups – including those in the priority target groups (Data collected through North Yorkshire IAG programme). Offering guidance would contribute to tackling these barriers by helping individuals to consider both short and long term plans, alternative routes to their chosen learning / career goals, including on-line learning. Evidence on individual needs and barriers obtained through delivery of the project was to be fed back to the LSC, to Learning Providers and other Community Partners to inform their decisions in relation to future learning provision, particularly through the North Yorkshire Learning Partnership.
- Lack of self-esteem and confidence in their own abilities, lack of motivation and low skills often result in lack of participation in work and learning – these traits are familiar in isolated rural areas. Through and integrated IAG process, our project would aim to start to challenge these barriers and support individuals in the development of realistic, achievable learning and career management plans.

## 1.5 Methodology

The methodology outlined below was build upon the current work developed in the Community through the very successful York & North Yorkshire IAG programme and previous experience in delivering guidance in the community through ESF programmes. The guidance process we chose to adopt drew on the skilled helper / problem management model of G. Egan in which evaluation and self-evaluation play a strong part. It also tested the more recent NICEC evidence based theory known as New Dots (“New DOTS: Career Learning for the Contemporary World” NICEC Briefing (sensing, sifting, focusing and understanding about opportunities, self, decisions and transition). Through this process it was expected that clients would not only be assisted to find suitable opportunities for learning and work but would also develop the skills of self-development, career exploitation and career development and become managers of their own future careers. In this way we would utilise lessons learnt from the SRB6 funded guidance project to further develop a model of guidance that utilises the outreach methodology employed in the IAG programme. It was important to us to ensure that the guidance been delivered was firmly anchored in tested and proven and accepted robust theories of guidance to ensure that practitioners who were operating with an NVQ 4or above in Guidance which ensured a solid base of knowledge and understanding of the complexities of the guidance process and its application

Existing partners within the IAG Programme identified priority 'guidance' clients and a skilled guidance worker was 'semi-attached' to information and advice partner agencies in key local communities to establish rapport and trust.

The result being short interventions with clients encouraged to investigate and think through learning and work options at a level deeper than that offered by existing information and advice workers.

In addition:

- We also wanted the project to have the facility to fund a range of partner agencies to get involved in Bitesize Guidance. Community based organisations were able to bid for some development funding to deliver educational guidance to boost or provide a first level guidance service where there were gaps / limitations in provision currently.
- An email service was established to enable individuals to access guidance through ICT
- A telephone guidance service would enhance the existing telephone Helpline Service by engaging clients in extended conversations to establish their guidance need and by providing educational guidance.

Self evaluation and cognitive awareness of client's own development during this integrated guidance process would be encouraged through an emphasis on evaluation of the impact of access to guidance for all beneficiaries. This evaluation would include questionnaires and discussion groups for selected samples of clients. The guidance workers were also invited to review the process and their own part in it. This evaluation would be integral to the guidance model and also inform the learning outcomes of the project, which will be disseminated and used to build upon for our own future partnership plans. The guidance workers were to pilot the Connexions assessment planning implementation review (APIR) tool with their adult clients where applicable, which would also bring structure to their sessions, and could be analysed later in terms of feedback to our funding partners.

### 1.6 Innovation

There was very little guidance provision, free at point of access, available currently in North Yorkshire as described earlier. The provision available was mainly "traditionally delivered", that is through people booking for themselves an in-depth discussion with a guidance worker, which could take up to one hour, and was more often than not seen as a one off intervention. This was the model traditionally delivered in an educational setting.

The exception to this is was we had a guidance worker funded by a small amount of SRB6 money, working mainly around Scarborough. We wanted to expand and enhance this type of outreach delivery arrangement that she had so successfully begun to pilot, which consisted of developing relationships with other intermediaries working in the community, in order to identify clients in need of guidance support. We would deploy skilled guidance workers to offer a number of shorter interventions, which would encourage individuals to examine in greater depth issues within the New DOTS model, leading to their enhanced economic and social well being.

Thus we aimed to take innovative 'bite-sized' guidance out into the community, working with partner agencies. The guidance workers would be offering this as an "outreach guidance service" delivered through personal direct contact (The emphasis would be on partner referrals rather than self-initiated), through an email guidance service, and over the telephone, as appropriate.

To secure more and better referrals, we particularly aimed to build the capacity of specifically identified partners as listed below. This enabled their information, advice and other staff to identify client need and to refer to the guidance workers those most likely to benefit from guidance. Referral was facilitated through guidance workers scheduling regular drop-ins to them and / or their centres; to meet the staff, offer support and meet referred clients.

## 1.7 Structure Of The Project

North Yorkshire is the biggest county in England therefore our structure need to reflect how we would deliver across such a wide geographical area. In economic terms much of the county is designated as “super-sparse” which indicates that there are few conurbations and many small villages/hamlets in addition to a number of small market towns. This meant that we had to ensure adequate coverage for all residents.

- Guidance Services (as the lead body for the current IAG Partnership) acted as legal entity to hold the Contract. They have a network of Careers Centres situated in the main towns of North Yorkshire covering the surrounding districts.
- A key element of the project was to have one main delivery partner i.e. Guidance Services, which could provide staff at the required levels both in qualifications and amount.
- Two senior managers were put in place to manage the contract and the project.
- The Guidance Services Business unit produced internal audit trails for finance and performance.
- We invited bids from local partners to deliver the level 3 Educational Guidance that amounted to 13% of the total contract value. This was split into two distinct parts- accessing Community Groups and individual guidance interventions (level 3)
- Alongside the IAG Programme, all four projects were trying new ways of working with clearly defined, hard to reach target groups, which they could not do under their existing contract due to limited funded hours.
- Guidance practitioners qualified at NVQ level 4 or above were contracted to deliver the short, in-depth and follow up guidance interventions, focus groups and e-mail guidance using a developing model of guidance (see under Methodology).
- A crucial element was the ability of guidance practitioners to go to the clients regardless of their whereabouts across North Yorkshire. This resulted in a number of locations being utilised, which were non-traditional.
- A Helpline facility provided by The North Yorkshire Learning Helpline was originally contracted to provide a telephone guidance service to enhance their existing telephone Helpline Service by engaging clients in extended conversations to establish their guidance need and by providing educational guidance qualified at NVQ level 3 in guidance.
- It was also envisaged that an e-mail service would meet the needs of clients from a rural area and an e-mail address for each Careers Centre was promoted via the Helpline and marketing information and the IAG website- Signpost direct
- Career Productions, now **ge**consulting were contracted to develop the guidance model with practitioners and to evaluate the project to the designated 85% customer satisfaction level.
- Based on prior knowledge of previous contracts, the IAG programme and the Helpline operation at the time the following targets were set in the original bid.
  - To advertise the service to 200 organisations.
  - To provide in-depth guidance to 400 individuals
  - To offer 100% follow-up action, e.g. information, research, introductions
  - To provide 800 guidance ‘interventions’
  - To provide educational guidance for 390 clients
  - To offer a referral free-phone telephone service to 5,000 north Yorkshire clients with 4,000 individuals provided with telephone guidance
  - To provide the following geographically based (Selby, Craven, Hambleton /Richmondshire, Harrogate, Scarborough/Ryedale) focus groups for clients
  - To provide 3 evaluative focus groups for the project workers

## 1.8 What Did We Set Out To Achieve?

In setting out the methodology of the project the outcomes have been explained however in summary the result of the project is a tested and well-documented integrated IAG approach, which can be transferred to other areas. We hoped to deliver guidance to some of those most in need in rural England, as well as under-represented groups such as Carers who will be encouraged into the workplace and into learning. Partnership with a broad range of community-based services has assisted in the maximisation of scant public resources for the rural and urban areas such as North Yorkshire. It has raised the profile of guidance in the community, using case studies of local people and the distance they have travelled which is very powerful. IAG now runs as a strand through all the projects identified for the next round of ESF Co financing in North Yorkshire's Prospectus for 2003, recognising the value and worth of this provision.

We wished to expand the capacity of the IAG network and programme and have provided staff development within partner agencies and greater coherence and collaboration. In addition we foresaw a number of "spin off's" from the project emerging as partner agencies have approached the project to discuss providing similar provision within their organisation or next funding bid.

## 2. DESCRIPTION OF ACTIVITIES

### 2.1 Project Planning

- Guidance Services were invited to tender and were notified of a successful bid by the DfES in February 2002. A Contract and Project Manager were appointed to the contract in March 2002 from within the lead organisation. Both senior managers took on this role on a part-time basis according to need.
- A meeting was held in London in March 2002 which provided the first opportunity to meet representatives and colleagues from DfES, the other successful pilots, Merlin Minds; contract managers on behalf of DfES and representatives from, DRS (Data Resource Specialists), MORI and IES Institute of Employment Studies). The pilots were briefed on the importance of demonstrating that guidance could make a social and economic difference and were introduced to the Management Information (MI) that we would be required to collect on the bespoke DRS system. We were also informed of the client evaluation that MORI would be conducting and the Case-study work of IES.
- As with all pilots, we quickly established the challenges that the reality presented and we re-looked at our original proposal in light of the above. One of our key concerns following the briefing was our ability to manage the MI data collection and input, as we had not made allowance for this within in our initial bid. We also had concerns about how to gain client consent and the nature of the MI for the outreach; community groups work, where the intervention was likely to be brief initially. We did not see any great difficulty gathering this MI in an in-depth guidance intervention with an experienced adviser. The control group for MORI and IES who would not be part of the adult guidance pilot, was also an issue, as our target group within North Yorkshire was anyone 20yrs +.
- A chronological account of start up and ongoing work is outlined in the timetable below. To allow us to put our structure in place only a small amount of delivery took place in March '02 but the project commenced fully across the county of North Yorkshire in April 2002 therefore we had a month's slippage across the timetable in general.
- As a predominately outreach project, we welcomed the opportunity to ensure that equipment/hardware and software could be purchased at the beginning of the project, however once the confirmation of funds was received the ordering of this while speedy still took some days to effect. We purchases laptops, printers, career software packages such as Adult Directions, Odyssey, word and office for formulation of CV's, letters of application etc and internet access via BT Openworld Connect accounts opened for job search, LMI and other essential research. Mobile phones were purchased for all staff delivering an outreach service with training on lone working and a refresher on the company's Health & Safety policy & systems.
- A meeting was held for all staff delivering on the contract for Guidance Services and the Learning Helpline for a project briefing, instructions on the MI completion, reporting requirements and a training session on the model of guidance to be piloted. As this stage tendering had not taken place with the community organisations for delivery of educational guidance.
- A marketing plan was put together of the agencies to be notified of the pilot in addition to those identified within the bid.
- The bid specified 3.5FTE Guidance practitioners qualified at NVQ 4 would work on the project. To enable us to deliver in such a wide geographical area as the whole of North Yorkshire we translated this into 10 part time advisers working across the county. Inevitably as the contract progressed staff turnover affected delivery therefore there was a need to add other delivers on a part-time basis to the contract. This resulted in up to 16 advisers at level 4 delivering on the contract to meet demand, although the original 10 were the core team.

## Planned Timetable December 2001 – March 2003

	D e c	J a n	F e b	M a r	A p r	M a y	J u n	J u l	A u g	S e p	O c t	N o v	D e c	J a n	F e b	M a r
North Yorkshire Learning Partnership IAG Working Group meetings (Steering the Project)	■				■						■				■	
Secondment / recruitment of staff	■	■														
Training in Connexions tool.			■													
Development of Guidance Model	■	■														
Publicity material developed / distributed		■	■	■												
Guidance Delivery		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Focus groups for client sample							■	■	■	■	■					
Follow up questionnaire													■	■		
Final Report															■	■
Focus groups for staff			■				■							■		

### 2.2 Recruitment Of Staff

The management and administrative functions were drawn from staff currently in post during March and April 2002. A number of skilled guidance workers qualified at NVQ level 4, who were experienced in working with adults, and were currently employed on a number of contracts by Guidance Services were reallocated to this project upon confirmation of the contract and their commitments reviewed and reallocated. In this way, staffing most suited to the outreach model was re-deployed in order to commence the projects. We adopted a flexible approach to staffing delivery to meet varying demand within the county during the pilot with additional Careers Adviser time allocated to Harrogate and Selby to meet demand.

### 2.3 How Were Staff Organised And Managed?

Local Careers Centre Managers within Guidance Services maintained day-to-day line management for the Guidance practitioners based from their Centres with oversight of their monthly targets and progress updates by the Project Manager at a monthly Operations Forum although the Project Manager had overall responsibility for the project and required staffing. The Project and Contract Manager are based within the same centre which allowed for ease of communication, however informal monthly contract reviews were held to ensure that the contract was progressing satisfactorily on all fronts. For all sub contractors, line management responsibility and achievement of targets was down to respective organisations. The Project Manager held regular practitioners meetings to discuss the emerging model as well as contractual requirements. All partners were invited to disseminate information and share good practice and enable valuable networking between agencies. This provided a useful forum for resolving issues and identifying any gaps, checking appropriateness of referrals and clarity on roles and responsibilities. The Project Manager also undertook site visits and provided training and advice to partner organisations.

## 2.4 Partner Staffing/ Recruitment Issues

Out of the four sub -contracted community partners agencies contracted to target specific client groups, without exception, all experienced staffing difficulties. Indeed, one partner withdrew from the project all together in January 2003 working with offenders and ESOL clients in HMYOI Northallerton having lost their third worker to work on other projects and the pressures of a forthcoming Adult Learning Inspection.

A second partner working with disabled groups in the community in the Richmondshire area reported that the limited hours on a short term project caused problems, even though the staff were existing IAG workers. Timings meant that workers were not always available when the client groups were available, this is always a problem with part time work, but it has a greater impact on a short -term project. The advantage of the IAG workers being involved was that they have a strong understanding of first level information and advice and this proved to be an advantage with this client group, which requires more time and support. Due to the nature of the client group, limited hours and feelings of isolation as an outreach worker, saw one of the two workers resigning altogether from their IAG work as well as the additional project hours.

The third project, working with primary schools in the Ryedale area was led by an experienced Community Education IAG worker who engaged a new IAG worker to take other work from her to free up time for herself to work on this pilot. Unfortunately, this worker was lost later in the project, which impacted on delivery and compounded access difficulties to PTA's and governors for this project.

The fourth contractor was slow to recruit to their project, working with members of Scarborough South community who lack self –esteem and self-confidence and have disengaged from learning and education. This projects provided access to emotional and literacy support through the Getting Connected programme. This project has been very successful but did not start until the end of October 2002, as they were unable to recruit a suitable worker and eventually approached an existing part time adult learning tutor to the project.

There was also an initial phase in the project that consists of developing systems and the guidance model. An experienced consultant within the Guidance Enterprises Group assisted in the development of the guidance model. She is nationally recognised and has published works and training materials on putting such theories of guidance into practice successfully. Learning Helpline staff have an IAG background with some already at Level 3. All were existing staff moved from other contracts

A qualified and experienced researcher who has worked on national projects undertook the evaluation, focus groups etc.

## 2.5 Delivery Model

As outlined in the methodology section we adopted an innovative model of guidance, which utilised theories of guidance including “New DOTS”. The Skilled Helper Model by Egan (looking at the current scenario, the preferred scenario and the strategies for the achievement of the preferred scenario) was used to build upon the successful information and advice outreach methodology of the current IAG programme. This resulted in a guidance process, which uses a number of short interventions, hence the name Bitesize, getting progressively more advanced. The process and outcomes for clients have been heavily evaluated, so that the evidence will enable the LSC and all local partners to prepare more extensive plans to grow the availability of full IAG across the County.

## 2.6 Benefits To Adopting This Approach

The approach outlined not only build the capacity of the existing IAG network, to add value to the information and advice services, but it offered the most appropriate method of delivering guidance to the residents of North Yorkshire, and in particular those in the rural areas. These are often low skilled or those who suffer from multiple disadvantage and barriers to entry to learning.

Utilising an outreach methodology whereby guidance workers go to known community Centres, join with trusted and respected partners, and add value to their current provision – delivery was local to the clients, which also helped to overcome the barriers of travel/access.

The defined client referral process was also beneficial in appropriately targeting those who truly need an even more in-depth approach. Yorkshire Delivery Workers at NVQ level 4 were able to offer a greater level of skill as a resource for the benefit of the people of North Yorkshire – and that resource was targeted in partnership with our information and advice colleagues.

## 2.7 Evaluation

Evaluation is an integral part of the central activity and a key innovative component and is outlined in other sections of this report. The elements that will be monitored and evaluated include client profiles and outcomes, the success of aspects of this guidance process and the overall impact of the project in the areas in which it operates. At the time of writing our proposal, Guidance Services were unaware of the additional evaluation that MORI and IES would be conducting.

## 2.8 Changing Direction

Some of the aspects of the project were altered as it progressed i.e.

- *Telephone Helpline targets*

The original bid specified 5000 interventions. It quickly became clear that in producing comparative data for the original bid the age range of callers had not been taken into account. Much of the marketing around the Helpline is aimed at Modern Apprenticeships not at the adult age group. The geography of the project had been assumed to include the city of York. The city of York was served by another guidance project therefore callers in the city of York were not counted towards this project. Much of the Helpline work is referral to other agencies and they found that callers were unwilling to stay on line to undertake the more in-depth intervention that the diagnostic process required therefore callers were often lost. In discussion with the Merlin Minds contract manager this target was revised downwards.

- *E-mail targets*

Despite the use of 6 e-mail addresses (one for each Careers Centre) very few requests were received. We canvassed client opinion and they seemed to feel that it was not personal enough and a bit removed from the type of intervention they sought and valued.

It has been used as a follow up mechanism and to deliver information to clients after initial intervention and guidance has taken place.

Despite ongoing personal marketing to groups this was never a route that potential clients seemed comfortable with. It is interesting to note that previous surveys indicated that there were fewer households with computers in North Yorkshire than other places in the country. There has been great progress through UFI Adapt and learndirect and other funded projects to get computers out into all sorts of places both traditional and non-traditional. E-mail may be something that will develop in the future once use becomes second nature.

- *Number of staff contributing to the project*

The bid specified 3.5FTE Guidance practitioners qualified at NVQ 4 would work on the project. To enable us to deliver in such a wide geographical area as the whole of North Yorkshire we translated this into 10 part time advisers working across the county. Inevitably as the contract progressed staff turnover affected delivery therefore there was a need to add other delivers on a part-time basis to the contract. This resulted in up to 16 advisers at level 4 delivering on the contract to meet demand, although the original 10 were the core team.

- *Bought additional hardware and software*

A particular strength of the funding for this pilot was the ability to respond to the needs of the project. Due to the changes in staffing outlined above further hardware and software was requested and agreed which was an enormous help in delivering the project

- *The MI took on a far greater significance*

We did not have any appreciation of the complexities of the management Information requirement at the outset of the project therefore

- *Project management increased*

Further demand both in attendance at conferences, organising and liaising with MORI and IES and DRS as well as managing and promoting work with a rearrangement of partners.

- *Fewer Educational Guidance bids received*

The information on the educational guidance was sent to all members of the IAG Network in York and North Yorkshire – 500+. It was circulated to all Network Co-ordinators of which there are 9 covering the county. It was communicated to Learning Partnerships and to IAG steering groups. It was disappointing to receive such a small number of expressions of interest. Some of this may have come from a lack of organisational capacity

- *Loss of an educational guidance partner*

This was not anticipated and happened at such a late stage that we could not take any remedial action.

- *Increase in in-depth interventions by Guidance practitioners*

Through both educational guidance and the IAG Programme many clients who sought Bitesize guidance came to the meeting well prepared and clear about their objectives. Particularly through the IAG programme where guidance has featured as the largest unmet need for some years IAG workers have taken their clients to a well-developed point in the guidance process. Based on ESF projects in the county previously many clients still expected a one off intervention of significant duration. In many cases this was difficult and indeed counter productive to insist on the Bitesize model. When operating in outreach mode there tend to be interventions of the short kind and we were able to offer clients the opportunity to take full advantage of the resources held in each Careers Centre Information Shop. When clients took this option they expected a longer one off intervention with the careers adviser. The pilot allowed expectations and us to respond to client needs.

### 3. STRENGTHS/THINGS THAT WORKED WELL

- Bitesize was a "pilot" project, which was a massive strength in itself as this allowed for change, adaptation, and generally a very flexible approach to meet the needs of clients.
- True partnerships have been established across the county, from positive links with primary schools, Jobcentres, Community Centres, Sure Start projects, learning providers, disability groups working, learndirect centres to WI groups and mental health forums all of which will be maintained through the IAG programme and any further projects that are shared by all partners.
- Delivering guidance at level 4 to the adult population of north Yorkshire.
- Due to the strength of the partnerships developed referrals were also a strong element of the project. Feedback from partners indicated that the open access and ease of referral and points of contact made this operate effectively.
- It was both desirable and effective to involve communities in the progress of the project.
- Delivering guidance to all adults who share the rural nature of living and working in North Yorkshire was refreshing, as there were no complicated eligibility criteria to explain to potential clients. The aim of making this client centred.
- The Bitesize model of intervention – removed the pressure to try and resolve all client issues in one meeting. It also offers more ongoing support for clients to enable them to progress into learning and work.
- Using the developed guidance model to explain process of career change to clients and to help them to see a way forward for themselves. The Self-Help guide grew out of this.
- Bringing the guidance practitioners and partners together to review and reflect on the use of the proposed model with clients.
- The DfES pilot gave practitioners the space to be more innovative and reflective.
- Newsletter- this has gone to a very wide variety of partners who are members of the IAG Network as well as to other stakeholders both inside and outside of North Yorkshire.
- Equal Opportunities -Guidance Services' Equal Opportunities Policy formed the basis of ensuring and promoting accessibility of services to all regardless of gender, status, geography, ethnicity or individual need. In addition to this Policy all delivery partners also had published policies, which contributed to the assurance of equality of provision across the whole project. Guidance Services Ltd has experience of delivering publicly funded contracts, including The Careers Service Contract now part of Connexions York & North Yorkshire and New Deal 18-24 and 25+ that require ensuring of equality of access for a wide range of client groups. Partners worked to the Guidance Council Code of Principles and the National Guidance Standards for Learning and Work.
- Client feedback - please see under outcomes and case studies for further information

*I am happy to praise Bitesize*

*Excellent, changed my whole life*

*Being given renewed faith in my own abilities was helpful*

*Developing a focused approach I the next steps necessary to move forward was especially helpful*

*Being challenged as to why I was remaining in an unrewarding job was helpful*

*The Bitesize interviewer made me believe in myself again and to move forward positively*

- One of Bitesize Projects greatest strengths as that the client group was wider than many other projects may be aimed at which makes drawing specific parallels difficult. The key messages however may be the same in terms of getting a range of partners investing in the project, ensuring sufficient coverage across the designated area, making the product clear to the customer, responding to client expectations and needs in a flexible way, listening to their comments and where possible acting on them.

## 4. PARTNER INVOLVEMENT

### 4.1 Partners

Guidance Services (as the lead body for the current IAG Partnership) held the Contract and sought to plan details of the delivery programme both with NYCC Community Education and other key Learning Partnership/Community colleagues. This involved significant contact with local community based agencies to ensure links and establish trust in the Community. Links were made through initial contact with outreach workers, tutors or staff in agencies already operating in the community, including:

- *North Yorkshire County Council Economic Development and the NFU* to ensure effective focussing of provision on areas hit by farming in crisis and to seek to assist developing/maintaining employability through learning and skills development not simple diversification.
- *North Yorkshire County Council Community Education Department* -IAG outreach workers and Basic Skills tutors.
- *Tutors of the Workers Education Association*, especially those working on their rural outreach programmes.
- *Staff of Askham Bryan College*, (a land-based college) especially the admissions staff and colleagues of the sites at Harrogate, Bedale, Guisborough and Pickering.

Staff at the locations of the mainstream *IAG Programme development projects (2001-2)*, including *Harrogate Carers Resource and the Darlington College at Catterick disabled project*.

Staff at the locations being developed as Community Information Points under the mainstream IAG Programme, these include *Ryedale CVS, Castle Choice Centre in Scarborough* (Sure start funded ex-women's centre now broader remit), *Scarborough Home and Dry Project*. (Young people's homeless project, up to the age of 24); together with other centres as they developed in the timescale.

North Yorkshire based staff from the wider associate *network of 'Network York & North Yorkshire'*.

A number of community developments during the course of the project, have arisen from the LSC community investment prospectus process. We have tried to link to these as they have come on stream, e.g. one-stop shops being developed at Pateley Bridge, Kirbymoorside, Hawes, and Reeth.

### 4.2 Links

Crucial to delivery was building trust with organisations. Guidance Services utilised Area Learning Partnerships of which there are 7, where applicable, and drew on information and developments coming from the Community Investment Prospectuses currently being developed in the County.

Coherence with the IAG Programme was ensured, as Guidance Services referred for strategic oversight of the project to the North Yorkshire Learning Partnership IAG working Group. This group feeds in strategy to the Joint Learning Partnership IAG sub-group for York and North Yorkshire, which steers the main IAG Programme and this partnership 'guidance' project featured in detail on the agenda of the joint sub-group. The North Yorkshire IAG working group has a representative of the Basic Skills Network, Employment Service and Higher Education on it as well as NYCC Community Education, York and North Yorkshire Guidance Services and the IAG Programme Manager.

## **The Projects: Educational Guidance**

### Introduction

Educational guidance to groups within the community was delivered through workshops, group activities, presentations etc. The following are the successful projects funded under Bitesize Guidance across North Yorkshire.

#### **i.) Primary Role, Central Ryedale**

To set up 'surgeries' at the two primary schools on set days/times in accordance with school provision and ease of parental access. Libby, who runs the surgeries has trained to OCN level 3 in 'Information and Advice support for adult learners' The surgeries will work on a 'drop-in' system, whereby individuals may come and discuss any aspect of learning, education, employment and related issues. The individual will be offered an initial assessment and primary advice and information. Where appropriate, i.e. in cases of employment related queries, each individual to receive a CV/Interview pack. Referrals to other agencies may be made at this initial stage and individuals will be made aware of Signpost Direct and shown how to access it on the Internet

The targets are: -       80 people to receive information marketing the project  
                                  30 people to take advantage of the 'Bitesize Guidance' through the surgery system  
                                  20 people to take advantage of IAG through telephone guidance

#### Case Study

Female aged between 29 and 45 who is working as a Non Teaching Assistant (NTA) in a very small rural primary school. Did not want to give up work to do a degree but wanted to become a teacher as a long-term goal. After much discussion she has enrolled on a part time foundation degree in child studies at York St John. The degree is largely worked based and relies on you having a job such as NTA. She is really enjoying the course and can see herself extending it to cover a full degree with the view to teaching full or part time. Furthermore, the course has shown up shortfalls in her maths knowledge and she decided to go for A level maths, however provision was on an evening already committed or daytime during the other course's timetable. The client then decided after looking at the syllabus with me to re-sit Maths GCSE as it had changed so much from when she did it years ago. She has now enrolled on Maths modular GCSE and sat her first exam on 19th November.

*Contact Libby Pearson 01653 694122*

#### **ii.) Reach out to Bitesize, Northallerton**

To deliver educational guidance to boost opportunities to target groups and to provide a first class service where it is recognised that gaps/limitations exist to IAG provision. To work closely with the ESOL tutors who operate across a number of venues within Northallerton to offer information, advice and 'bitesize' guidance to individuals and small groups and offer a telephone referral service to individuals. The venues would include Her Majesty's Youth Offenders Institute, Northallerton, The Sundial Hotel, The Friarage Hospital, Northallerton College and The Au Pair Agency. Work was also undertaken to target fast food outlets within the town. Many of these individuals are isolated due to their lack of English and Basic Skills and therefore suffer from a lack of self-esteem and confidence in being able to access for themselves local support and information on training opportunities. This also has a detrimental effect on the individual motivation and participation in learning

*Contact Lynn Bell 01609 773340*

### **iii.) Getting Connected, Scarborough South**

The Getting Connected (GC) Mentoring and Support Programme is intended to offer access for the identified target groups to 3 courses throughout the year. The courses will take place from the Community Education Centre in Eastfield. As the programme is designed to meet the needs of the learner a variety of locations are used. This may include the meeting place of a Community Group for example the 'Women's Refuge' or even a persons home. GC has been piloted in Scarborough South successfully during the last 6 months. It is a curriculum framework, which supports the re-engagement of disaffected members of the community into learning and work. The curriculum is intended to enhance the self-esteem and emotional literacy of those people outside the formal education and training system. The characteristics of the GC Mentoring Programme units are self-esteem and emotional literacy, learning outcomes and performance criteria, individual and group work. (*Contact Carolyn Drinkwater 01723 584130*)

### **iv) IAG in the Community, Darlington College at Catterick**

To raise awareness of disability issues to employers by helping to set up awareness/information sessions, and to identify appropriate referral to agencies offering additional support/training/guidance. To link in with the IAG workers from Richmondshire to ensure a comprehensive first level service is offered in a rurally isolated area. To increase awareness of employment and benefit issues such as changes to therapeutic earnings and to continue to identify barriers and promote access to those with disabilities. Work will be carried out within the college and identified community settings as appropriate to individuals/groups to develop client interest via Health and Housing associations. (*Contact Annette Clark 01748 876700*)

### **The Projects: Learning Helpline Bitesize Guidance**

#### Description Of Activities

- Bringing the Bitesize guidance project to the attention of all eligible Helpline clients. There were 403 interventions offering clients career guidance
- Including fliers in all postal Helpline enquiries, to clients over the age of 19, promoting Bitesize guidance
- Approaching IAG organisations by letter, telephone and visits to promote Bitesize guidance. These included - all Primary Schools, all libraries including library vans, Community Education Centres, Citizens Advice Bureau, Community Centres, WI Groups, Learndirect Centres, and meetings of the Lions, the Wensleydale Women and IAG Networks.
- Delivering initial guidance to any client whom requested it. Initial telephone guidance was delivered to clients by discussing with them their current career situation, their aims for the future of their career, their interests outside work, what qualifications they had and what further qualifications they might need to consider, where they could research for course information or any other background information they may need, and asking them to consider whether there may be any barriers to interfere with them studying towards or taking up a new career, or whether there was any other information regarding their personal situation they wished to discuss.
- Determining client's position on the Bitesize guidance model by using the information obtained above
- Forwarding client details to the most appropriate Bitesize guidance practitioner. All clients who wished to be referred for more in-depth guidance were, and details were obtained from the client to determine the geographical area which best suited the client.
- Suggesting to clients which areas it would be appropriate for them to do further research in before they had a face-to-face interview with a Careers Adviser and, if that information was obtainable through the services of the Learning Helpline, sending it to them by post.
- Informing the client of organisations they may need to know about for the progression of their career after they have seen the Careers Adviser
- Liasing with Guidance practitioners about locally planned activities such as drop ins.

### Strengths/Things That Worked Well

- Being able to have direct contact with the guidance practitioners
- Acting as a referral point
- Moving clients forward in their career planning and thinking
- Building knowledge and contact with a wide variety of community groups
- Marketing using the “post cards”
- Newsletter

### Issues

- Targets for the Helpline were unrealistic – a large percentage of callers were not eligible for Bitesize Guidance – Approximately 35% were under the age of 20, approximately 30% lived in York or outside the county of North Yorkshire.
- Promotion visits to organisations included – 50 libraries; 12 library vans; 6 Citizens’ Advice Bureaux; 13 learndirect Centres; 119 Women’s Institutes; 9 Community Centres; presented to 5 meetings and exhibited at a 1 day event.

## 5. PILOT STAFF DEVELOPMENT

- The meetings held by the Project manager, which brought together all the level 4 practitioners, and latterly the partner organisations acted as the main Bitesize staff development however, Guidance Services has a well-documented staff development process that applies to all of their staff. All partner organisations are encouraged to take up opportunities within their own establishments. The majority of the funded partners are NYCC Community Education or a FE college who will have staff development processes in place.
- Feedback from the practitioners indicated that the focus on guidance itself and the benefits as well as the opportunity to reflect on the process and outcomes was a strong feature of the Bitesize process.
- In bringing the practitioners together the project manger lead on the development of a guidance model for Bitesize. This involved the input from the external consultant on theories of guidance.
- In terms of widening both practitioner and partner knowledge and understanding the IAG contract manager from North Yorkshire LSC was also invited to participate in this work.
- All practitioners undertook training in Assessment, Planning, Implementation and Review (APIR, the Connexions framework) as a further development in their toolkit to use with clients where there are barriers to learning and work to be focussed on.
- The pilot gave Guidance practitioners the opportunity to try out different approaches. Contracts can often be very prescriptive in the way advisers need to work, who they can see etc., with an expectation of high numbers of individuals to be seen. The DfES pilot gave practitioners the space to be more innovative.

## 6. ISSUES

- The strength of Bitesize was that it was open access. This was easy for the public to understand. As well as being strength it was also a weakness as we received a wide variety of clients, from unemployed, women returners, redundant high flyers, and employed career changers however, due to the variety of clients and their needs it was difficult to build up cohesive expertise, which could have been cascaded to other staff.
- There was a tension between delivery in a traditional setting of a careers centre where there is constant demand from eligible clients accessing the Careers centres or from other agencies such as Jobcentreplus and being innovative and carrying out outreach activity which takes time to build and establish for harder to reach clients.
- In some instances where there was a great interest in accessing this guidance practitioners introduced drop in's and clinics.
- Management Information System presented a number of difficulties, some of which were resolved with the help of the Merlin Minds contract manager. Other required further technical work to overcome and to allow the production of the required reports. This was not to be underestimated in impact on the project particularly in time from the Project and contract managers and IT specialists. The figures on the table at the end of the document include figures that are a result of a manual analysis due to the inconsistency of reports from the data system. The highlights are recorded under section 3.0 Strengths; the MI system provided the most challenges in progressing the project.

## 7. GOOD PRACTICE

- It was a privilege to be one of the 20 National pilots, which was welcomed by all parties in North Yorkshire.
- This was a great opportunity to provide 'A method of guidance which enables clients to self evaluate their progress, delivered through short interventions under rural outreach methods.
- The flexible and responsive structure of the project was conducive to developing in more than one direction i.e. it allowed for experimentation. This is often missing from other projects and colleagues from all Organisations including DfES, Merlin Minds, and Guidance Services etc are to be congratulated in promoting this pilot activity.
- Production of 3 Newsletters highlighting real case studies and what has happened to clients since participation.
- Production of a Self Help guide to aid sustainability of the project.
- Feedback from clients indicated a high degree of satisfaction.
- The national aspect in making the case for guidance and its links with the new IAG contracting arrangements.
- Built the capacity of the IAG Network.
- Opportunity to undertake participation in Real Times Real Lives.
- Widening participation from community groups in IAG including referrals.
- Related projects include Sure Start in Scarborough, The Early Years Partnership and the NSPCC. We had always hoped this would be an outcome of the pilot.

## 8. LESSONS

- A recorded client need was information on the economic profile of the area i.e. labour market information. This has been discussed with the IAG Programme manager in terms of provision through a variety of media into a variety of outlets.
- To get involved in national developments/initiative such as the writing of the Real Times, Real Lives resource materials, which practitioners felt was beneficial.
- Referral should be to and from. Partnership agencies have co-operated well within Bitesize and this has also been discussed in reference to the IAG Programme.
- Outreach works, but requires a high investment in time, money and in front loading delivery. A certain style of delivery works in this situation.
- Drop in sessions – managing these is a skill. They can be extremely popular and provides a flexible form of access but set up their own challenges. It is important to consider the following:
  - Can be difficult to keep the contact brief
  - Need to be carried out in a public area but then you can end up with a queue which puts the adviser and client under pressure negating any confidentiality, problematic in collecting MI, however if you use an interview room, clients can often expect an in-depth interview
  - To avoid everyone arriving at once it is useful to stagger the drop in times.
  - Sessions worked best when the guidance practitioner and information advisers worked together, enabling the information adviser to support research with the client or undertake some initial diagnostic work

## 9. OUTCOMES

9.1 Appendix 1 lists outcome tables

### 9.2 Bitesize Guidance - Customer Satisfaction Report

A customer satisfaction questionnaire was distributed to approximately 1100 clients across North Yorkshire that had used the Bitesize Guidance Service.

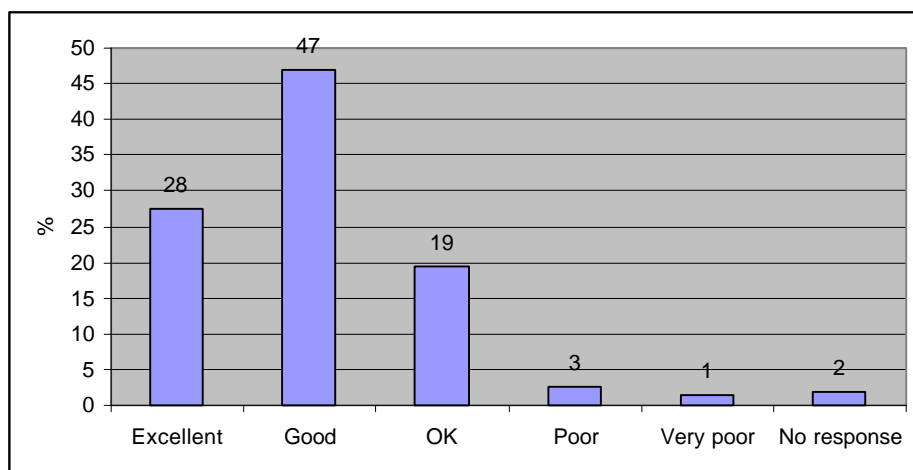
Feedback forms were distributed by post in March 2003. Reply paid-envelopes were included for the convenience of respondents and to encourage participation.

In total, 149 clients returned a questionnaire (approx. 14% response rate).

The data below shows the results from one key question to enable some analysis of how satisfied customers are with the service. Figure 1 shows the broad percentage responses to the question 'based on your own experience, how would you describe the Bitesize Guidance service overall?'

**Figure 1:** Based on your own experience, how would you describe the Bitesize Guidance service overall?

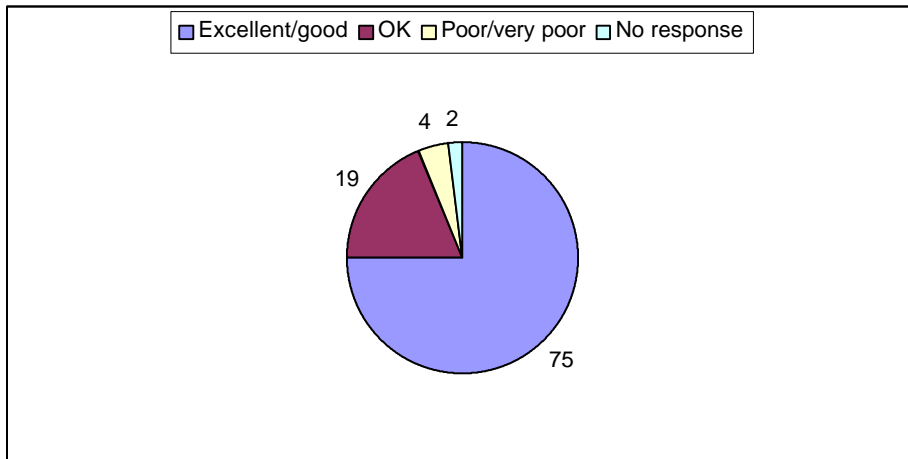
(Base: 149)



More than a quarter (28%) of those who responded said the service they received was *excellent* and almost half (47%) said that the service was *good*. Around one in five respondents were reasonably satisfied with Bitesize (19%). A total of 94% of respondents were satisfied with Bitesize.

Figure 2 shows the same data, this time aggregated to show the categories 'excellent/good' and 'poor/very poor'.

**Figure 2:** Based on your own experience, how would you describe the Bitesize Guidance service overall? (Aggregated)  
(Base: 149)



The data when aggregated shows that three quarters (75%) of respondents described high levels of overall satisfaction with the Bitesize service.

Only 4% expressed dissatisfaction with the service overall. They will be followed up.

An example of a positive outcome from Sure Start in Scarborough was during the pilot one of the Guidance practitioners working on the project went to one Sure Start group for a term 'Time for Toddlers?' between 2 and 10 parents attended each session with their children. Over time the group got to know the adviser, Lucy got to know their children and them, then gradually people asked about jobs and training. One lady has now been offered a place on an Access course starting in September; others are considering part-time study and childminding.

Sure Start is keen to continue to offer this service and is investigating the possibility of buying careers support in.

## 10. CONTRACTOR SUPPORT

### 10.1 MORI

Unfortunately Mori has not feedback from any of the discussions, interventions and or initial feedback they received. This was a weakness as we would have been keen to gauge the client perception of the project when Mori originally intervened. We will look forward to the outcomes of the longitudinal survey, as we are confident that the case for guidance will be proven. We were not informed about the control group and the communication between MORI and the project was poor. Venues and clients were booked and then cancelled without notification to the Careers Centre holding a room. Bitesize received complaints from clients regarding the process and in some cases clients as promised did not receive incentive payments. This reflected badly on the project, as that was the clients association

### 10.2 IES

Generally the case study activities went well and were professional conducted, however, as with MORI, we look forward to receiving feedback

### 10.3 Merlin Minds

At the outset of the project the allocated days of contract management seemed large in number. The initial risk assessment however clarified the contact details to both parties satisfaction. The contract manger Les Wheatley has provided ongoing encouragement and support and has always been willing to travel to meet with us in North Yorkshire. He has been contactable via e-mail and telephone and has provided help when asked. He has been flexible and accommodating in working with us to not only to resolve issues but to support our plans and ideas, all of which has contributed to the success of the project.

### 10.4 DRS

The most challenging area was that of the management information and client data system. This was a new bespoke system developed for all of the pilot projects. The crucial area of searching and querying posed some difficulties for us. The development of any MI system particularly one that is so project specific needs to be tried and tested which unfortunately did not happen prior to the Pilot projects. The initial changes to the client data also added to the general difficulties with the data. Support from the Merlin Minds contract manager was most appreciated in helping us to resolve specific difficulties.

## 11. CASE STUDIES

### Case Study 1

**The client:** Single parent, currently working in local secondary school as a Learning Assistant. Holds a HND in Hotel and Catering with relevant experience, C & G Teaching Certificate with D32/33. When she became a single parent she took the job in a school because it fitted in with being able to look after her child as childcare is expensive.

Her reason for accessing guidance was to find out what she could do with her existing qualifications in order to earn more money and to work in a flexible environment.

**The adviser:** Qualified to Dip CG part 2 (NVQ 4), worked in 14 – 19 guidance and adult guidance for 10 years. Previously in maintenance engineering, management and recruitment with same company for 28 years.

Contact was made by the client after talking to a Careers Adviser who worked in the same school.

**Guidance Process:** Discussed the client's background and reason for guidance. Family circumstances had changed recently, required job where could look after her child with minimum disruption and required more money, also using her existing qualifications.

She professed an interest in training, so I suggested Further Education in a teaching context or Training Officer and Assessor with Training Providers. After looking at these jobs in more detail she decided that Training Officer would be more suitable and possibly more flexible.

As she would now be doing a job search her CV would require updating and a targeted version was recommended. We discussed this and I gave her relevant information plus a list of training providers to apply to. I advised her to have her updated CV checked and was welcome to make another appointment.

**Key issues for the client:** Working hours in terms of childcare, finance, upgrade of job, better prospects, career path.

**Outcomes:** Client updated and targeted her CV and had it checked by the CA in school as it was more convenient. She applied to the training providers with her CV and covering letter, which came to nought due to lack of vacancies.

In the meantime a vacancy occurred where the successful candidate would be working with young offenders and we felt she would be interested due to her interests in working with young people anyway. She applied for and got the job. A few months down the line and she is enjoying the challenge and she can see her way forward more clearly.

**Making the case:** Found a better job which links in better with her skills, working more hours and has strong possibility of further hours, although still on benefits (working families tax credit) she is paying more tax and NI and further hours will see less benefits and even more tax and NI! Enhanced career prospects.

**Comments:** The information provided about CV's was very helpful as was the help received in making my CV more effective.

This client was generally very grateful for information, advice and guidance given and was happy to recommend the service to others.

**Client declaration:** I am happy for the above details to be passed to Bitesize Guidance and DfES for use as a possible case study / press story.

## **Case Study 2**

**The Client:** She was until recently a 23yr old office receptionist working in an architect's office. She had never intended to work in an office, as had completed a GNVQ Advanced course in Health and Social Care and intended to go into the care field. This is a very common tale amongst adult clients.

After initial fast promotion, 4 years flew by and job satisfaction was declining rapidly. She came to the Careers Centre as the Centre had helped her into employment when she left school. She wanted to try and use her qualification but was unsure how to proceed.

**Guidance Process:** She initially talked to the Centre's Information Assistant who introduced her to the Adult Directions computer programme as an initial attempt to generate job ideas. This programme was a revelation to her. She commented that it "broadened my ideas, was excellent for researching jobs and introduced me to the job I eventually got - Occupational Therapy Assistant."

I saw her after she had time to reflect on Adult Directions. She was uncertain how to relate her skills and experience to the jobs identified on the list. We looked at the aspects of the jobs and related them to her experience in her current job and also her course and work experience. I moved her forwards substantially in this area and confirmed this by conducting a mock employment interview, as she had been empowered to apply for an Occupational Therapy Assistant.

She felt that she was well prepared for her interview as she had now realised her skills and how they matched the job." thinking what I could take to the job gave me confidence, and was an excellent preparation for the interview and contributed to my getting the job."

She had been originally keen on nursing, but by looking at her responses to the Adult Directions programme and discussing them with her she realised that nursing was not the career she should be pursuing, as she was seeking a job involved with the health care of people but not directly treating them. The result of this was that she had crystallised in her mind the type of jobs that would match her skills and interests, also was saved from going into the wrong career, at a critical time in her career decision process. She has got a job as an Occupational Therapy Assistant in the Health Service, which is desperately short of staff as it is trying to expand and hit government targets.

She is no longer under employed she is doing a job that matches her skills and interests. Since starting the job on a part time basis, hours have been increased plus she has been offered the chance to start on the part time Occupational Therapy Course locally at York and St John's College. She has been encouraged to be told that life experience is very important in the job and it has been a benefit to her to come into the profession through a vocational / life experience route. This is an important lesson for adults that their life experience can count for a lot in an environment where they perceive academic qualifications are all.

She feels she is in the right job "this is more my type of work, it matches the person I am and brings out my qualities." Bitesize has helped me an awful lot. It has given me so much direction. I knew I was in the wrong job and wanted to use my qualifications. Bitesize has helped me achieve this."

She is still accessing the Careers Centre, she attended a drop in day organised by Harrogate Careers Centre where Advisers from Higher Education came along to give advice and information on careers. She used this session to gain information on Occupational Therapy Courses.

**Client Declaration:** I am happy for the above details to be passed to IAG Bitesize Project and DfES for use as a possible case study/press story.

### **Case Study 3**

The client works in a call centre for a Building Society. She was making good academic progress at a local secondary school when she developed ME (myalgic encephalomyelitis). Due to her medical condition she did not take the full number of GCSE's originally planned, but succeeded in achieving six GCSE's grades A-C and, for health reasons, decided against progressing to the 6<sup>th</sup> form. When her condition improved sufficiently to resume her studies, she took a BTEC National Diploma in Information Technology. Still not up to full strength, she then accepted employment within the call centre, which would not place demands upon her.

Now 28 years of age and with ME behind her, she wishes to pursue a more fulfilling and challenging career.

As the initial guidance interview got underway, she outlined her current situation and the background leading up to it. She knew she wanted to make a change in career but lacked direction and was unsure how to proceed.

First of all we explored why she felt unfulfilled and dissatisfied with her current role. She had always been active when younger and had not envisaged working in an office. Not interested in financial products, she was finding that dealing with credit facilities did not fit with her own personal values. Continuing to work for the Building Society in some other role outside the call centre was not an option she wished to consider. She was seeking a change, a career more in line with her interests and values and which would be more rewarding in terms of personal satisfaction. In the future, she had a dream of perhaps working in Italy, France or Spain.

I then probed to identify what she would like from her jobs, building on her interests and values, which were important to her.

The client has a keen interest in animals, in particular working with horses where she has much experience, and enjoys photography. She prefers being in a rural setting. Working with people is important and she had been involved in working with the Punjabi community, which had given her opportunity to learn to speak and read some Punjabi. She told me about her interest in health and that she had gained a qualification in Swedish massage. Financial stability appears important to her and she is reluctant to take out student loans and put herself into debt. She is not interested in self-employment. Whilst wanting to make a change, she wants to minimise her risks and is keen to move into an occupational area where there would be employment opportunities. We then moved on to identify the salary level she would hope to secure.

We then moved on to link her interests to possible occupational areas, keeping the ideas very broad at this stage. The following ideas were generated: Working with animals; health service occupations; complementary therapies; sports therapy; work within the community/social care; teaching.

We explored these in more detail, identifying specific occupations and looking at what was involved. Some ideas were discarded when we looked at salaries which fell below the clients required income, others because there were not many opportunities locally; or she did not feel comfortable with the nature of work involved. Whilst she felt capable of assuming a responsible role she was deterred by the thought of incurring debt if these required lengthy university study. However, when her attention was drawn to National Health Service bursaries, she was given food for thought. By the end of the interview we had identified a number of occupations, which she planned to find out more about: to broaden her awareness of opportunity. Health care occupations, community work, social professions, physiotherapy and sports massage. I also suggested she use Adult Directions to check out other career suggestions. This was documented in the form of Action Points.

When the client returned for her next interview, I found that by looking at information in the Careers Centre and using Adult Directions her ideas were much more focussed and had narrowed these down to nursing, physiotherapy, sports therapy, paramedic. We were able to investigate these in more detail, working through her understanding of the information and relating this back to herself and the criteria she had outlined earlier. We also discussed why she was not interested in some of the occupations she had discarded to ensure her decisions were sound.

Towards the end of the interview she decided to initially concentrate her research on nursing and physiotherapy. These two occupations had a strong correlation with her interests in health and people, and built on her skills in massage. I checked out how she would respond to full time study, to working in a hospital environment, how she would feel if at the end of the course she needed to move away from home to find job opportunities and the financial aspects of making a commitment to either of these two careers.

I advised that she continue to find out more information about these to ensure she would be making a fully informed decision. We planned a two-pronged approach. Bearing in mind her interest in working in Europe I agreed to make enquiries to establish whether UK nursing or physiotherapy qualifications were valid for work in Italy, Spain and France and ensured relevant information was pulled together to enable her to do some research without delay. For her part, she would contact local university tutors to find out, as a mature student, what entry requirements would be required of her to study nursing or physiotherapy, read the information which I would send and arrange time to call into the Careers centre for any further information needs.

I further advised that she consider some work shadowing to find out at first hand before she committed herself and pointed out that this would help any application to university or employment. I also advised her to not just focus on one occupation but to have a back-up plan. An Action Plan was drawn up following the interview.

To facilitate communication we had agreed to use e-mail. A week later I received communication in which she told me she had arranged to attend an open evening at a local university and, if all went well, was aiming to apply for a Health Foundation on physiotherapy course starting in September. She had also spoken to her employers who had agreed to cutting back to 4 days a week so she could be available to carry out work shadowing – she was in touch with the local hospital to arrange this.

I was then able to clarify the situation with nursing and physiotherapy qualifications in Europe.

Today she sent in her university application and is arranging a further interview to discuss her back up plan.

## **Case Study 4**

**The Client:** The client was in his forties. He was born into a farming family and following the family tradition went onto study an HND in agriculture returning to farm the family's land. He ran a modernised medium sized farm, livestock and arable. He came to see a CA in May 2002 explaining that due to the difficulties of the agricultural industry he was planning to wind up the farm and for the first time in his life he would be looking for a job.

**May 2002** – He hoped to use his agricultural knowledge and had some job ideas (park ranger, agricultural and environmental advice, conservation) but was very uncertain about how to go about seeking work. He was referred for a more in-depth guidance session.

**June 2002** – The CA discussed his job ideas in more depth. What would these jobs involve on a daily basis? How would his present skills match the skills of these roles? How could he provide a more perfect match? How would he find such jobs? Together the client and the CA identified that he lacked IT skills would benefit from an IT course. Advisory roles would require office skills and report writing which was also an area he had little experience of but felt he could develop these. The CA discussed the need to identify his skills and begin to compile a CV. He was concerned about references, given that he had always been self-employed and time was spent discussing appropriate persons. He was provided with careers information detailing roles, the skills and personal qualities required and information to help him to produce a CV. He was encouraged to return with the CV for comments. The CA also discussed job seeking and networking. At this stage he felt his main problem would be finding the time to think and prepare as winding up the business would be time consuming.

**Nov 2002** – He had completed an application form for a job, but was not offered an interview. He was about to complete another application form and wanted help. He was advised to bring a copy of his unsuccessful application form to the next meeting and attempt to complete the new application in rough in the meantime.

**Nov 2002** – The client and the CA looked at a photocopy of his old application form. The CA advised him that he was being too modest and not selling himself. He was also encouraged to always ask for feedback. He needed to target the skills required by the job rather telling the story of his life. He was given a work sheet on how to identify his skills and in-depth information on interview preparation.

**Dec 2002** – The client and the CA meet to review improved application. Much improved.

**Jan 2003** – The second application was unsuccessful. However the CA felt that progress had been made and he was truly selling his skills in line with those required by the job role. He asked the employer for feedback and was told that there were many applicants with the same qualification and experience required for the job. He knew that he was in a popular and competitive field.

**Dec 2002** – He managed to secure an interview for a job. He was busy preparing for the interview, using the information provided and had questions to ask. He was concerned about the dress code for the interview, how he would deal with the question of salary and whether he would need to take his certificates with him. The CA and the client discussed how to manage the interview.

**Feb 2003** – He was not successful. However, he had very positive feedback from his interviewers and established that he was one of eight, out of sixty applicants and that they were impressed by his application. The CA discussed the interview and interview questions. He had established from the feedback that they felt he was not quite assertive enough. The Careers Adviser discussed working on how to demonstrate this the next time he has an interview. He is feeling confident and positive. He is surfing the Internet and networking for vacancies and has 4 applications on the go.

**Client's comments regarding his guidance:** "A real insight", "A real boost on occasions".

**Client declaration:** I am happy for the above details to be passed to Guidance Services Bitesize Project and DfES for use as a possible case study.

## **Case Study 5**

**The Client:** She left school with few qualifications, but was determined to pursue a career in office work. In order to gain a qualification she completed an NVQ level 1 in Business Administration. She later married a man who is in the RAF, which meant a lot of travelling. During this time she had 2 children and worked part time as a sales assistant. She currently works as a care assistant in a nursing home as the hours are flexible and fit around the children. Her youngest child is due to start school and she now wants to look at career ideas.

**The Adviser:** On completion of my Diploma in Careers Guidance at Northumbria University in May 2000, I started work as a careers adviser for Guidance Services based in Selby. I provide career guidance to a range of clients both in schools and college and more recently to those on New Deal, miners affected by redundancy and adults accessing Bitesize Guidance. I worked with her as part of the Bitesize Guidance IAG contract.

**The Guidance Process:** At the beginning of the interview she lacked confidence and was unsure what she could offer an employer. She was also unsure of her career direction. We talked about the jobs she'd had in the past, and the aspects she enjoyed. We pinpointed that she enjoys meeting people and providing a service to the public. Through her work as a care assistant she is also used to dealing with people who can be uncooperative. We looked at her previous interest in business administration and how she felt about exploring work roles in this area. We discussed the work of a secretary, receptionist, clerk and call centre work. We compared the skills and interests she has to each job role. She felt she was most interested in the receptionist's role. We looked at all aspects of the job to ensure she had a realistic idea. I asked questions such as:

How do you feel about that?  
Do you enjoy telephone, computer, paperwork?  
Have you had to deal with customer complaints?

We then looked at short college courses to build her confidence and customer service/keyboard skills. She now plans to enrol on the ECDL course.

### **Key Issues For The Client:**

Childcare issues – she has not pursued a career to date as she has found the cost of childcare cancels out the financial benefits of working. However she now feels in a position to consider a career, as her youngest will be starting school. She feels there should be more affordable childcare placements to help mothers balance a family life with a career.

Lack of confidence – she feels she will not be competitive in the labour market. We talked about her transferable skills from both past employment and from her role as a mother. At her next appointment we will work on this further by updating her CV and constructing a speculative letter.

**The Outcome:** She left feeling more on control of her future. We had identified a work area and pinpointed a college course to develop work-related skills and build confidence. She wants to take gradual steps towards her goal, and will return for further guidance on job search skills.

**Making The Case:** The guidance process so far has helped her to think about her future. The college course identified will improve her skills level, and enable her to make a valued contribution to society when she gains employment. She has a lot to offer – she has the interpersonal skills, and upbeat personality required to become a receptionist. Through support and guidance I feel she has recognised her own worth, and will succeed.

**Anecdotal Comment:** I know what I need to do now and feel more confident and determined. I'm pleased that I can come back for more support and guidance.

## 12. WHAT'S THE DIFFERENCE?

The biggest difference it has made is in providing professional level guidance for adults in North Yorkshire free at the point of access regardless of stringent eligibility criteria but cognisant of the limitations of living in a rural county.

We have tried to highlight the difference this pilot project has made locally as we have gone through this report:

- The provision of professional guidance to adults
- The range of case studies highlighted in the report
- The involvement of a wide range of community partners
- The links to the Information Advice and Guidance Programme
- The overwhelming support for guidance for adults based on the 94% satisfaction rate from client feedback forms
- The enormous amount of informal feedback and soft outcome information from practitioners and partners

One of the biggest differences has been the opportunity to participate in such a high profile and important pilot activity on guidance for adults. This has given us the opportunity to try new approaches, to succeed in some, fail in others and learn lessons from all of them. Although the Bitesize project is not continuing in its entirety, the service it leaves behind is now much better equipped to meet the needs of North Yorkshire clients.

## OUTCOMES

**Total number of clients seen during the project:** 1545\* followed up with a further 25 to be followed up as seen at the end of the project so total seen is 1570.....

	EMPLOYMENT	VOLUNTARY WORK	SELF EMPLOYMENT	LEARNING		
				FE	HE	Other
<b>CLIENT OUTCOMES</b>	313	16	3	455*		11*
<b>OUTCOMES AS % OF TOTAL CLIENTS SEEN</b>	20%	1%	0.19%	29%		0.7%

NB \* These figures are a result of a manual analysis due to the inconsistency of reports from the data system.