

European Lifelong Guidance Policy Network
Work Package 4 – Quality Assurance/evidence-based practice and policy development
Field visit

Peer Learning Review Event held in Tallinn, Estonia, 23 – 24 May 2011

Meeting place: St. Olav Hotel in Old Town (Lai str. 5, Tallinn)

Reflection Note: Deirdre Hughes, Lead Consultant and
Tibor Bors Borbély-Pecze, Hungary

1.0 Introduction

1.1 This Reflection Note provides an overview and synthesis of the peer learning review event held in Tallinn on 23rd and 24th May 2011. The event was chaired by Hungary and was attended by representatives from 13 countries (Denmark, Estonia, Germany, Greece, Hungary, Ireland, Lithuania, Luxembourg, Norway, Portugal, Slovenia, Sweden and the UK/Northern Ireland). The Tallinn study visit was based on the theme of building a coherent EU approach to quality assurance and evidence-base policies and practices. Raimo Vuorinen (Network Co-ordinator) joined the meeting to provide updates on EU developments within a Lifelong Learning and Guidance (LLG) policy context.

1.2 The aims of WP4 are to:

- Get more countries involved in discussions on the QA framework in order to gain broader ownership and engagement on these issues, e.g. by establishing links to the WP1 and WP2 in particular, or by “twinning exercises”.
- Use the proposed elements of a QA framework based on:
 - A small number of agreed quality criteria.
 - Agreed standards for these criteria.
 - A small number of indicators for measurement.
- Draw conclusions for the updating and further development of the common reference tools and making them more concrete and operational (feeding into the new Task Group).

Thus, the next step would be for the ELGPN to:

- Continue and finalise the QA framework with regard to reducing the number of indicators, work on further operationalisation of indicators, and decide on required data collection.
- Launch a pilot study in several countries which are interested in testing the proposed indicators and the QA framework.

1.3 During the meeting, members focused on:

- learning from contrasting and complementary quality assurance and evidence-based policy developments in six countries (Denmark, Estonia, Germany, Greece, Ireland and Lithuania)
- reviewing and assessing the efficacy of existing common reference tools (CRT) and producing draft recommendations for improvement;

- identifying a framework for the possible content of the chapter on WP4 of the manual/toolkit;
- reviewing appropriate frameworks designed to capture evidence on impact of careers services; and
- agreeing the second draft Glossary (listing and draft content) for discussion at the next ELGPN Steering Group meeting.

2.0 EU overview

2.1 Raimo Vuorinen presented an overview of the EU 2011 Hungarian Presidency events specifically related to career guidance and lifelong guidance policies which include:

- The ELGPN 8th Plenary Conference
<http://www.eu2011.hu/event/6th-plenary-meeting-european-lifelong-guidance-policy-network-elgpn>
- EQF Conference
<http://www.eu2011.hu/event/conference-european-qualifications-framework-0>
- Grundtvig has organised its final conference *"It is always a good time to learn" on implementing the Action Plan on Adult Learning* 7-9 March 2011
<http://www.eu2011.hu/event/its-always-good-time-learn>
- PES Conference
<http://www.eu2011.hu/event/stepping-challenge-repositioning-public-employment-services>
- EMCO Informal Meeting on Youth Unemployment
<http://www.eu2011.hu/event/informal-meeting-employment-committee-emco>

For more details visit: <http://www.eu2011.hu/>

2.2 Tibor Borbély-Pecze highlighted recent developments within a Public Employment Service (PES) context, for example, a new PES 2020 strategy has been developing in which LLG features - visit: http://ec.europa.eu/europe2020/index_en.htm. Also, a first conference was held under the European Commission's new mutual learning programme for public employment services – PES to PES Dialogue (P2P) – on 11 and 12 May 2011 – visit: www.pes-to-pes.eu. The conference received keynote presentations on new approaches to **profiling and holistic assessment** and on the use of **profiling for resource allocation, matching and action planning**. An overview of national examples of profiling approaches in public employment services (PES), their implications for service delivery and planning of integration processes, as well as their **impact on the work of employment advisers** are currently being examined. Some aspects are highly relevant to WP4, particularly in relation to the six sectoral areas to be developed within the new manual. It was noted that an analytical paper was produced for P2P on LLG and PES 2020 by Prof. Tony Watts and Tibor Borbély-Pecze – visit: <http://ec.europa.eu/social/BlobServlet?docId=6767&langId=en>. Other expert papers are also available – visit: <http://ec.europa.eu/social/main.jsp?langId=en&catId=105&newsId=1025&furtherNews=yes>

2.3. Significant developments in the field of LLG systems have taken place in: (i) the Balkan states of Montenegro and Croatia; (ii) the ETF Turin Process (2nd Phase) where the LLG is included in the development of VET in EU neighbouring countries; and (iii) the University of Heidelberg through an ERASMUS-funded network of European universities examining qualifications, competences and skills requirements of career counsellors in Europe. The latter point is particularly relevant to WP2 & WP4. It was noted that Deirdre Hughes would further investigate these developments to avoid duplication of effort by member states in gathering national and EU evidence on quality assurance and evidence. The work of the International Centre for Career development and Public Policy (ICCDPP) – ‘Prove it Works’ thematic group will also feed into WP4 developments.

3.0 WP4 update

3.1 The ELGPN Task Group and Steering Group meeting will take place in Brussels on 30th June 2011. Following this, a draft structure of the ‘new manual/toolkit’ (August – Sept. 2011) will be available for the member states. This will then be discussed during the Warsaw plenary on 13th -14th September 2011.

3.2 Tibor Bors Borbély-Pecze introduced the revised work programme and content, as well as the new WP4 section within the ELGPN website. Members agreed to use RSS feeds in order to receive regular reminders of WP4 information uploaded onto the site. The ELGPN website currently operates at three levels: (i) overall introduction; (ii) database development together with the Euro-Guidance Network; and (iii) meta-data. Relevant information from member states will be uploaded into WP4 by participants, either independently, or by the Hungarian team.

3.3 Members noted that **Annex 5 from ELGPN 2008-2010** publication should be fully retained as a baseline framework, though the five criteria outlined namely, (i) citizen/user involvement; (ii) practitioner competence; (iii) service provision and improvement; (iv) coherence; and (v) outcomes - require simplification. Deirdre Hughes highlighted that reflecting upon Sub-Group1 discussions in Copenhagen, the **five main criteria** could become more manageable by framing these within **three or four main criteria** namely, (i) – (iii) above plus ‘cost benefits’, underpinned by coherence across six sectoral areas and linked to learning, economic and social outcomes, where appropriate. This is discussed more fully in sections 5 & 6 below.

3.4 Denmark and Luxembourg reminded members of being attentive to the challenge of capturing ‘**hard outcomes**’ on measurable indicators. In contrast, The Netherlands and Ireland focused on the critical importance of ‘context’ and ‘**soft outcomes**’ from inputs and processes in advice, guidance and counselling services. Luxembourg pointed to quality standards within VET systems (VET / EQVET) which could also inform WP4 developments. Germany challenged members to identify ‘what is good guidance?’ and to broaden existing quality criteria beyond face-to-face provision, to include web-based and telephone helpline services. Slovenia pointed to the formal adoption of career management skills (CMS) given these are recognized within and across European policies (linked to WP2 activities).

3.5 Clearly, quality assurance and evidence-base are inextricably linked to career management skills, access and co-operation and co-ordination mechanisms but operate within and across differing policy formations, sectors and delivery contexts. It was suggested that a clear structure for WP4 could include: a strong **vision; aims, principles** (based on adaptation of the existing CRT), **context, shortened quality criteria** with links made to **frameworks for capturing learning, social and economic outcomes**. This is discussed more fully in section 6 below.

3.6 Also, the **cost of investment in differing types of services and interventions** was noted as being under-researched. In this context, the extent to which an **analysis of member states' budgets allocated for web, telephone and face-to-face careers service** could be further analysed. It is recognised that the latter might be difficult, given public sector career guidance and counselling can operate as 'stand alone' and/or 'integrated' provision. A question was raised on the **estimated cost per differing type of intervention** and the extent to which such information exists within and across the EU member states? Participants were invited to reflect on whether or not such data should be captured on an EU basis as this could be built into WP4 developments.

4.0 Member State presentations

Denmark: Presenter - Hanne Woller, Ministry of Education

4.1 The Ministry of Education has invested in a major international systematic literature review, spanning 2000-2010, of research findings (meta-analysis) on the effects of educational and vocational guidance. The work was undertaken by the Danish Clearing House on Educational Research working with 'expert advisers'. The main criteria focused on four elements of intervention, namely, (i) form and content of guidance; (ii) structure of guidance; (iii) interested parties in guidance; and (iv) actors in guidance. The work focused on the effects 'transition guidance interventions' from primary to upper secondary, from secondary to higher education and from adulthood to employment. Findings are currently available in Danish with plans to translate this into English. A detailed overview of main findings visit: ELGPN WP4 website. Some key points are summarised below:

- *Form and content of guidance*
 - When guidance or counseling interventions are made has significance for their effect, but it is not possible on the basis of this review to provide a precise determination of when the right time point is.
 - It is not possible on the basis of this review to say anything about what role the duration of the guidance counseling process has for its effect.
 - Guidance or counseling may be advantageously integrated into the curriculum. In this way, guidance counseling can be part of a more holistic process.
- *Interested parties in guidance*

- Networks are a precondition for obtaining work-experience placements and visitation spots. Here, parents play a role.
- Businesses and institutions should collaborate on the structure of work-experience programs.
- Representatives of educational institutions and business may be advantageously involved as speakers.
- It is important to collaborate across institutions on the same and different levels.
- *Actors in guidance*
 - The level of knowledge and social background of the person being counselled has an influence on the guidance
 - Guidance has the greatest significance for students from environments without positive experiences in the education process
 - Gender plays a role in the form of the understanding of guidance and particular educational and occupational preferences and focus points.
 - A single study indicates that it may be an advantage for female students in a ‘male profession’ to have their own for a free of male students.
 - No factors have been found linked to ethnicity alone.
 - It is a prerequisite for the guidance counsellor to be sufficiently well-informed.
 - It is an advantage if the guidance counsellor is educated as a guidance counselor, but the personal relationship between the guidance counselor/teacher and the person being counseled has decisive significance.
 - Guidance counsellors, teachers and parents act as role models.
 - Parents and friends have significant influence as ‘informal’ guidance counsellors.

In summary, there are 14 main conclusions detailed in the report findings. It is clear evidence that careers interventions are effective with individual guidance having the most effect, followed by group counselling and classroom interventions. Whiston et al, 1998¹ highlight that ‘counsellor-free’ interventions are the least significant and computer-delivered interventions are the most cost-effective in terms of counsellor time, though not of client time.

Following on from this, it was noted that other relevant systematic literature reviews of careers education, guidance and/or counselling should be identified and uploaded by member

¹ Whiston, S C, Sexton, T L and Lasoff, D L (1998), *Career-intervention outcome: A replication and extension of Oliver and Spokane*, *Journal of Counselling Psychology*, Vol 45, pp. 150-165, cited in OECD (2004), *Career Guidance and Public Policy, Bridging the Gap*, OECD, Paris

states (and the lead consultant) onto the WP4 website. Evidence emerging from these and other related systematic studies could be cited by member states to inform and influence policies and practices at a national, regional and local level.

Estonia: Presenter - Margit Rammo, INNOVE

4.2 In Estonia, two broad levels of service operate, namely, (i) information advisers in schools; and (ii) counsellors. At present, there exists a joint formal agreement between the Ministry of Labour and Ministry of Education to develop a coherent national system. Cross-sectoral legislation is planned, with the intention to introduce in 2011/2012 a common **quality assurance brand** for different providers at national and regional level.

In this context, INNOVE provides a national guidance resource centre which has already published 3 Quality Manuals on: (i) the management of career services; (ii) career information and career counselling; and (iii) career education. These manuals have been piloted within 17 youth information guidance centres, 26 public schools and 6 VET schools. The quality indicators used include:

- satisfaction of the users of career services (measured through the use of standard questionnaires and interviews);
- satisfaction of stakeholders (representatives of the Career Guidance Forum) (measured through the use of standard questionnaires and interviews);
- satisfaction of career service professionals (measured through the use of standard questionnaires, interviews and ‘on-the-spot’ inspections);
- attainment of the objectives set (actual results are measured against intended results); and
- appropriate activities and lack of non-conformities (measured by the number of non-conformities/complaints).

The next steps include: a national study to capture evidence from users of services and practitioners on (i) levels of awareness; (ii) access; (iii) career management skills; (iv) co-operation. There are plans to introduce career counselling services in PES and higher education. It was noted that within the quality assurance framework of ‘practitioner competence’, selected areas from the IAVEG ‘Code of Ethics’ (1995) have been adopted in Estonia. There is currently strong interest in the economic benefits of guidance and social returns on investment.

Greece: Dimitrios Gaitanis, National Centre for Career Orientation

4.3 In Greece, there are approximately 1000 guidance centres in PES, schools and local government, though no formal internal evaluation of guidance services currently takes place. A study of EKEP ‘International systems for quality assurance in Guidance services’ was carried out in June 2007 in the context of “Development of EKEP”, financed by the Operational Program of Education and Initial Vocational Training (EPEAEK II) of the Hellenic Ministry of Education. This consists of four parts: (i) important international quality management systems such as ISO 9000, EFQM etc.; (ii) well known quality assurance

systems for career guidance such as the Matrix quality standard for information advice and guidance services and The Canadian Blueprint for Life/Work Designs etc.; and (iii) systems developed for the quality assurance of various public sector services in Greece e.g. system for evaluation of the continuous education and training centers of the Ministry of Employment etc.; and (iv) a proposed model system suitable for quality assurance in career guidance services of Greece. After piloting the system could be used for initial and continuous evaluation of Greek guidance services. Current work is undertaken against a backdrop of significant public sector cuts and efficiency savings. In reforming careers service provision, a matrix of quality criteria exists covering 6 groups of benchmarks in the following areas:

1. **Leadership** with 4 benchmarks
2. **Organizing** – planning with 8 benchmarks
3. **Guidance practitioners** – human resources with 8 benchmarks
4. **Client satisfaction** with 4 benchmarks
5. **Delivery of services** with 7 benchmarks
6. **Premises and equipment** with 4 benchmarks.

In 2010, these quality criteria were piloted in 10 main centres. A new survey of 50 centres is underway and each centre will be externally evaluated leading to a ‘certificate of conformity’, where appropriate. Both quantitative and qualitative data is gathered culminating in Annual Reports covering the: (i) delivery methodology; (ii) practitioner competence; (iii) client satisfaction; (iv) premises (the environment); (v) stakeholders’ evaluation of the services provided.

Ireland: Jennifer McKenzie, National Centre for Guidance in Education (NCGE)

4.4 There are 40 adult education and guidance centres in Ireland. During 2007, the National Guidance Forum produced a publication on national quality standards: visit - http://www.nationalguidanceforum.ie/documents/NGF_Quality_Report%20Final.pdf

In 2009, a ‘core checklist’ was further developed for the services. One year on, an evaluation of the quality assurance system showed that an internal and external evaluation methodology should be developed for service providers. In 2011, a handbook on quality was developed for the providers – visit: www.ncgeaegihandbook.com. At a national level, it is becoming more important that leaders and managers, as well as practitioners, have a clear understanding on career guidance activities and outcomes. There exists a national database in the field of adult education and the NCGE uses this for its evaluation and research activities. A new qualitative reporting system is due to be launched shortly with Executive Summary of statistical information and qualitative data (twice per year) for services to view and benchmark policies and practices (details available on the ELGPN WP4 website). Twice yearly reports will be generated from this and results will be available as national reference data on the NCGE website. A new LLG Forum is due to be established in 2011/12 (this previously operated from 2002-2007). There is no national career guidance (CG) system in the field of education and CG links with the PES are not, as yet, particularly strong.

Lithuania: Aleksandra Sokolova, The Ministry of Education and Science and The Ministry of Social Security and Labour.

4.5 In Lithuania, lifelong guidance policy development link to legislative arrangements such as: the Law on Education (2003, 2011) (vocational guidance: information, counselling and career education); The Law on Vocational Education and Training (2007) (vocational guidance); and The Law on Higher Education and Research (2009) (career consultations). The Ministry of Education and Science and The Ministry of Social Security and Labour define guidance service assessment (audit methodologies). Institutions (subordinate to the Ministries) organise and provide guidance services which include carrying out: studies of service impact upon users; estimates of career guidance costs; design of training standards for career adviser, teachers-counsellors and career counsellors; and systemic assessment of services provided. A National Programme for Vocational Guidance in the Educational System is currently being implemented. The main principles of the programme include: improvement of management – network of service providers – content – training of professionals; development of career management skills (career education); and continuity and succession of services (GE, VET and HE). For general education, VET schools and their career centres priorities include: a system of monitoring of guidance services in general education and vocational training (planned to be developed in 2011). For the national portal on learning opportunities (open information, guidance and counselling system (AIKOS) (www.aikos.smm.lt)): the **standard for AIKOS portal's descriptions** (2007) (Ministry of Education and Science) is currently being updated. For higher education (HE) institutions and their career centres, work is in progress on **quality guidelines** for student's career management services. A system of monitoring is in progress regarding **guidance services and graduate students' careers in higher education**. The purpose is to obtain data, analyse and evaluate the career of HE graduates (5 years after graduation) focusing on (i) employability; (ii) salary rates; (iii) further studies (or training); and (iv) satisfaction with their career.

Germany: Judith Frübing, National Lifelong Guidance Forum

4.6 Following the Copenhagen meeting (6 April 2011), Karen Schrober built upon the ELGPN Annex 5 template to include 'data collection methods' for member states' practical use in policy formation and implementation plans. A final version was agreed and uploaded onto the WP4 website (dated 10 March 2011). Following on from this, Germany pointed to the importance of triangulation when measuring the outcomes guidance. To obtain valid and credible results from measuring outcome indicators it is necessary to include different perspectives and combine different methods (triangulation or cross-verification). Germany presented to members a 'Balanced Scorecard (BS) approach' with 5-6 indicators including for example: (i) customers satisfaction; (ii) drop-out rate; (iii) transition success; and (iv) development of competences of the end-users (internal and external evaluations – based on career management skills). The German PES (BA) has experience of using the BS as a tool and has access to 'content rich' data. If there is interest of member states in working with the BS approach, Germany could give advise and could inform about its practical experience

Denmark responded positively and indicated that **7 regional youth guidance centres might be interested in piloting this approach.**

5.0 Common Reference Tools (CRT)

5.1 The CRT (CEDEFOP 2005) originally had 5 sub-chapters. In 2009 – 2010, the ELGPN WP4 modified and refined this. The key elements of Annex 5 reflect the current headings in the CRT paper i.e. citizens involvement; practitioners competencies; outcomes; coherent of services; and service provision and improvement. A draft discussion paper was presented to member states in advance of the meeting. Following some discussion on Annex 5 there are some logical mismatches e.g. customer satisfaction and effectiveness of guidance should be separated. The issue of redesigning the CRT in accordance with the 4 priorities of the Resolution 2008 (as suggested by WP1) was noted as a possible way forward.

5.2 WP4 members agreed that the following **five key principles could inform the content of the revised CRT:**

1. Ensure datasets are available on quantitative and qualitative information generated specifically related to LLG to include, learning, economic and social outcomes.
2. Develop continuous citizen/use involvement in the design and delivery of guidance services and products.
3. Build a cadre of competent careers practitioners who hold, or are working towards, nationally recognised qualifications.
4. Ensure a system is in place for independent/impartial career guidance which complements and extends teaching and learning within formal and non-formal systems.
5. Provide co-ordination between systems defining policies working to a common conceptual framework within and across government departments and institutions linked to national standards for service providers and professional standards for practitioners.

6.0 Measuring inputs, processes and outcomes

6.1 Member states received in advance a discussion paper (dated 23 – 24 May 2011), followed by a presentation in Tallinn from Istvan Kiss (University of ELTE, Budapest) on a potential measurement framework that could be adopted by member states to assess learning outcomes from one-to-one career guidance / counselling interventions. This qualitative research approach was developed under the SROP 2.2.2. national LLG system development programme. Sub-Group 2 had focused on preparatory work on the initial design and piloting of a ‘QA and Impact Measurement Pilot Project’. Members of Sub Group 2 include: Hungary, Luxembourg, Northern-Ireland (UK), Estonia Slovenia and the Czech Republic. Each of the member states expressed a specific interest in finding a suitable way to measure the learning outcomes from guidance /counselling interventions.

6.2 The aim of the QA and Impact Measurement Pilot Project is “international data gathering on a European level, to *identify* and *empirically analyse* key indicators on factors which prove beneficial in the development of participants of a Lifelong Guidance (counselling) process at an individual level”. The rationale for this approach is to build on an existing structure and systematic framework which has been trialled and tested in Hungary based on a model, designed by Heidelberg University, on counselling delivered within a systems approach, whereby the purpose of counselling is determined as an intervention fostering and encouraging self- organisation. An online questionnaire survey was presented to the member states for review and comment.

6.3 It was noted that not all member states felt this framework would meet their specific requirements; however, Portugal, Slovenia and N.Ireland expressed an interest in piloting the framework - subject to the Hungarian team refining the questions and having further discussion on specific adaptation for clients with low levels of literacy skills. There were some concerns about the timing and level of resource available for implementation and analysis of key findings. It was noted that this could also potentially feed into and complement the BS approach recommended by Germany. Istvan Kiss and Tibor Bors Borbély-Pecze agreed to link with the above-mentioned member states to develop a suitable common framework for piloting and implementation between July 2011 – September 2011.

6.4 From this, Denmark and Luxemburg highlighted that WP4 should remain focused on **developing a common EU framework on (i) quality element, (ii) criteria, indicator; and (iii) possible data.** Following the Copenhagen meeting, Deirdre Hughes agreed to produce a **shortened and more specific template for discussion and the contents were briefly reviewed in Tallinn (see Appendix 1).** Member states will now review the draft content, add to this (where appropriate) and test out / apply in their home country. The interim findings should feed into the Warsaw meeting in September 2011. It was noted that cross referencing and ongoing communication will be essential linked to WP1, WP2 & WP3 developments.

6.5 WP 4 members identified that policy-makers have differing expectations of what they want from investment in LLG. Examples included key questions ranging from: Is there a quality assurance system in place and does it work? Does investment make a difference – cost and returns? What is it for and the added-value benefits to the population and administration? What is the competence profile of practitioners? Does it reduce drop out? How does it address skills shortages in the labour market? How can you widen access to services with the limited resources available? How can you raise quality and reduce cost?

6.6 The WP4 initial attempt to design a flexible framework underpinned by a shared vision, aims, principles, six sectors and common elements (criteria) of quality is outlined below:

6.6.1 *Draft Vision*

Quality assurance and evidence-base policies and practices are key drivers in LLG policy formation within and across the European Union.

6.6.2 *Draft Aims*

To develop an EU flexible quality assurance and evidence-base framework(s) and mechanisms that provide robust and reliable information on the added-value benefits of LLG for citizens, communities and governments.

6.6.3 *Draft Principles (CRT)*

Refer to 5.2 above.

6.6.4 *Context*

The design of LLG systems and mechanisms to support:

- *individuals* to learn and develop career management skills (CMS) so they become effective career planner and decision-makers.
- *organisations* to provide quality resources that make a positive impact for end-users of their services and products.

6.6.5 *Methods of delivery*

FACE TO FACE (1:1/ GROUP); WEB-BASED; TELEPHONE HELPLINE

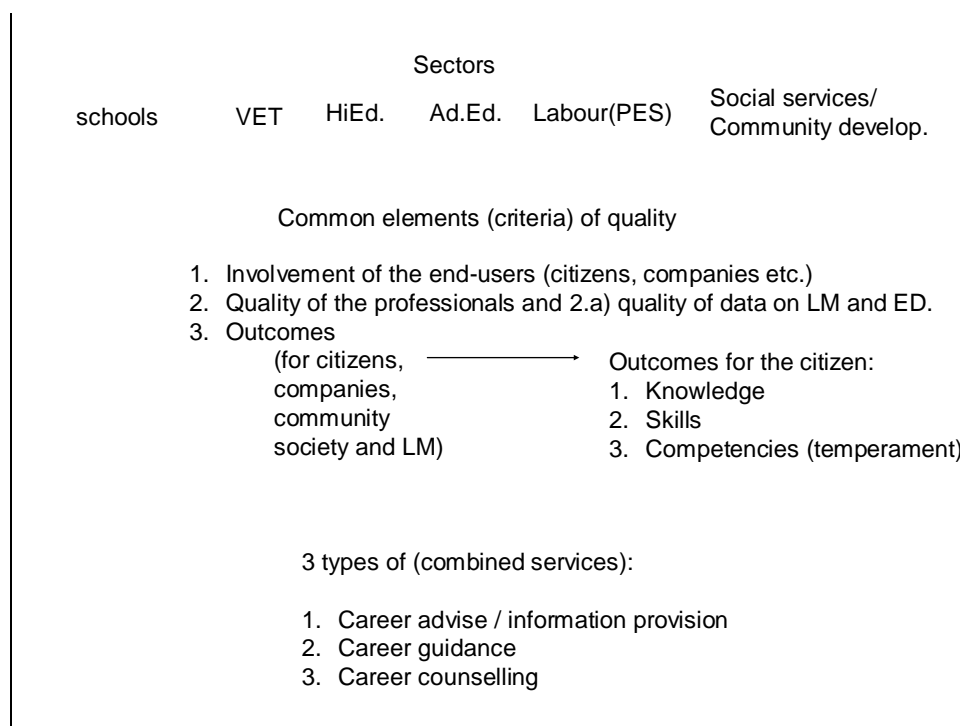
6.6.6 *Draft Quality Criteria and Indicators*

(i) Citizen/User Involvement; (ii) Practitioner Competence; (iii) Service provision and improvement; (iv) Cost benefits (Appendix 1 – first draft version)

Operating at four differing levels: (i) National / EU; (ii) Local/regional network; (iii) Institute /organisational; (iv) Practice and within and across six sectoral areas.[Raimo provided a systemic overview of differing levels operating within a policy context].

6.6.7 The diagram below broadly summarises key elements for further review and discussion with member states.

Diagram A



7.0 Agreed actions and a way forward for ongoing WP4 development work

7.1 Each member state volunteered to focus on 1 or more activities as described below:

- **Germany and Denmark** to link with one another to investigate the feasibility of testing out the BS approach (triangulation methods) – update on progress at Warsaw meeting.
- **Portugal, Slovenia and N.Ireland/UK** to link with Hungary to pilot and test out a slightly modified version of the ‘QA and Impact Measurement Pilot Project’ – timeline for the project to be confirmed by Hungary with respective partners – update on progress at Warsaw meeting.
- **Lithuania** to undertake a ‘watching brief’ and report back to WP4 Co-ordinator and Lead Consultant on developments in WP1 regarding careers education quality criteria and indicators – update on progress at Warsaw meeting.
- **Estonia** to link with interested member states on developing data on cost benefit and social investment returns, where appropriate – update on progress at Warsaw meeting.
- **Greece** to test out all four quality criteria in the draft template provided (see Appendix 1) from December 2011 onwards – ongoing update on progress.
- **Ireland, Sweden and Norway** to focus on capturing evidence on practitioner competence (see Appendix 1) and noting available findings from U. of Heidelberg 2010-2012 and CEDEFOP 2009) which will be uploaded onto WP4 website – update on progress at Warsaw meeting.

- **All participating countries** to test out and, as a result, make suggestions for revisions to the four quality criteria in the draft template provided (see Appendix 1) – update on progress and suggested refinements at Warsaw meeting.
- **Germany** is generally interested to test the quality criteria as well as a modified version of the ‘QA and Impact Measurement Pilot Project’. However, it is currently examining the different possibilities and their feasibility, before making any commitments..
- **Luxemburg** is currently unable to undertake any specific development work beyond attendance at ELGPN meetings.

7.2 Member states to every country will **add proposed quantitative or qualitative indicators to the four quality criteria in the draft template** in particular the **cost benefits** to government and citizens section.

7.3 Lead Consultant to provide WP4 members with **updated information from University of Heidelberg (ERASMUS project) and CEDEFOP project** on practitioner competencies key findings to date that specifically relate to quality assurance and evidence-base. Also, links with WP1, WP2 and WP3 to be investigated in more detail.

7.4 Member states to **upload any useful quality assurance and evidence-base approaches onto the WP4 website**, supported by the Hungarian team, including systematic literature reviews on LLG.

7.5 On-line **open session for the wider Network** co-ordinated by Hungary with input from Lead Consultant, agreed **July 1st 2011** using ConnectPro from 12.00 hrs – 13.00 hrs CET.

7.6 **Draft ELGPN publication has to be ready for April / May 2012** with the final version published in October 2012.

7.7 Second draft glossary to be submitted to the SG for consideration alongside other glossary proposals. Strong recommendation to retain key elements

8.0 Schedule for the further actions within the WP4:

8.1 Timings as outline above.

Deirdre Hughes and Tibor Bors Borbély-Pecze

(Updated document from 1st June 2011)

27th June 2011

Appendix 1

WP 4 has identified that different quality assurance (QA) models exist that have been applied to the planning, management and delivery of information, advice and guidance (IAG) services. These include approaches that seek to:

- standardise the process of organisational self-assessment²;
- measure the effectiveness of IAG based upon ‘ideal input’ factors³;
- gather evidence to demonstrate accountability⁴;
- distinguish between the various input, process and outcome factors involved in the delivery of IAG⁵; and
- apply a tri-variable model of quality assurance to IAG⁶.

Although these theoretical approaches differ in the detail of their content and application, common underlying themes exist which indicate that quality assurance is often conceptualised in terms of inputs, processes and outcomes. Generally, there are at least **three broad approaches to ensuring the quality of careers education information, guidance and counselling**. These include:

1. **Quality assurance of service delivery by organisations (A National Standard)** - The purpose of which is to quality assure the delivery of careers education, information, guidance and/or counselling services. For example through a national customised standard (e.g. Estonia, Lithuania, Greece) and/ or the matrix standard and contact centre association accreditation (UK) or a.n.other. The role of government is to formally endorse or ‘smile upon’ such national standard as an indicator of quality and hallmark for consumer/customer protection. Generally, employers take responsibility for leading on the design and implementation of national standard ‘kitemark’ with input from professional associations regarding practitioner competence.

2. **Quality assurance of provision in schools colleges, training providers and universities (Regional or Local Awards/Charter Marks)** - The purpose of which is to quality assure the provision of careers education, information, guidance and/or counselling services at a regional or local level. The role of government is to incentivise institutions to want to work

2. The EFQM Excellence Model is said to be the most widely used framework for organisational self-assessment in Europe and has become the basis for the majority of national and regional Quality Awards. For further details, go to:

<http://www.guidance-research.org/EG/ip/theory/tp/efqm>

³ Mayston, D. (2002) *Evaluating the Benefits of Guidance*, Centre for Guidance Studies: Research Report Series, University of Derby.

⁴ Sampson, J.P., Reardon, R.C., Peterson, G.W. & Lenz, J.G. (2004) *Career Counseling and Services: a Cognitive Information Processing Approach*. Chapter 14. Belmont, CA: Brooks/Cole.

⁵ den Boer, P., Mittendorf, K., Scheerens, J. & Sjenitzer, T. (2005) *Indicators and Benchmarks for Lifelong Guidance*. Thessaloniki: Cedefop.

⁶ Evangelista, L. (2003) Quality assurance in guidance services – a tri-variable model. *Professionalità Journal*. No. 78 Italy: Editrice la Scuola –<http://www.orientamento.it/orientamento/tri-varibale.pdf>.

towards a regional / local quality award linked to their continuing improvement plan (CIP) and external inspection frameworks. Employers have responsibility for implementation of CIP and careers professionals have role to perform in contributing to evidence and impact of careers and guidance-related interventions.

3. Quality Assurance of individual careers professionals (Professional Standards) -

The purpose of which is to assure users of the service that individual careers professionals are working to an agreed code of ethics and common professional standards.

FIRST DRAFT EXAMPLE OF SIMPLIFIED QUALITY ASSURANCE AND EVIDENCE FRAMEWORK BASED ON ELGPN ANNEX 5 FOR WP 4 MEMBER STATES TO TEST OUT, APPLY AND REVISE BETWEEN JUNE 2011 - SEPTEMBER 2011.

Quality Element	Criteria	Indicator	Possible Data
Practitioner Competence	Membership level of Professional Association	Total in LLG workforce % members of Professional Association e.g. membership of 1; 2;3;3+	Provider reports Professional Association(s) Self-reporting
	Recognised qualifications relevant to sector	Sector requirements % fully qualified % partially qualified % none qualified below a certain level	Professional Association Register
	Engaged in Continuous Professional Development	Nos. of CPD hours undertaken in 1 year - practitioner level - community of practice level	Provider reports Funder reports
Citizen/User involvement (Participants' experience)	Ease of access to relevant services and products	Actual numbers of citizens/users accessing the services either: on the web (nos of hits); by telephone (nos of	Management data including self reporting e.g. in-house systems; ICT tracking

Service provision and improvement		<p><i>callers</i>) ; and/ or one-one interviews (<i>nos of clients</i>).</p> <p>Staff to client ratio e.g. <i>nos of clients in set time period</i> divided by <i>nos of staff hours in set time period</i>.</p> <p>Cost per intervention e.g. <i>nos of staff hours and overhead costs</i> divided by <i>nos. of differing types of interventions</i>.</p>	<p>system (i.e.Google analytic software)</p> <p>Human Resource data Client throughput data Practitioner feedback</p> <p>Management information e.g. datasets on differing types of interventions including timings and costs.</p>
	Client satisfaction with services provided, including level of awareness in differing sectors e.g. schools, VET, HE, Adult Education, PES and SI.	<p>An agreed level of client satisfaction expressed as a percentage (%).</p>	<p>Client satisfaction surveys online and off-line. Appointment lead-in times</p>
	Learning and applying career management skills (CMS)	<p>Follow-up telephone or online surveys at agreed set intervals e.g. <i>three, six and/or twelve months (and beyond)</i>.</p>	<p>Practitioner and/or independent evaluation surveys</p>
	Quality management system (QMS)	<p>Learning outcome(s) related to specific aspects of CMS e.g. <i>11 career management competencies linked to national 'Blueprint'</i>.</p> <p>Evidence of a QMS to an agreed national common standard to include measures of (i) <i>practitioner competence</i>;</p>	<p>Pre- and post-treatment assessment test</p> <p>Inspection and audits in-house as well as by independent verifier.</p>

	<p>Latest ICT equipment and software</p> <p>Up-to-date knowledge in and expertise of education and labour markets</p>	<p>(ii) <i>citizen/user involvement</i>; and (iii) <i>connectivity to education and labour markets</i>; and (iv) <i>benchmarking and actions for continuous improvement</i>.</p> <p>Level of investment in ICT equipment and software <i>e.g. break down of actual costs compared to previous year.</i></p> <p>Level of investment in education and LMI resources <i>e.g. breakdown of costs for developing on-line and off-line publications and materials e.g. staff time versus buying in 'external consultancy expertise'</i></p> <p>Level of investment in staff training <i>e.g. % nos. of staff trained and associated costs e.g. on-the-job training; HEI training; other.</i></p> <p><i>% nos. supported to attend conferences and CPD events and associated costs</i></p> <p><i>% nos. of staff investing in their own attendance at conferences and CPD events</i></p>	<p>Self reporting</p> <p>Client usage figures and satisfaction surveys</p> <p>Human Resource information</p> <p>Expenditure costs and assessment reports on 'added value returns'</p> <p>In-house training audit system</p>
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<p>Cost (Societal) benefits to government</p>	<p>Profile and characteristics of service user groups (<i>clearly defined linked to policy target groups</i>)</p> <p>Immediate, medium and long-term savings to public purse from specific forms of interventions</p>	<p>Percentage of users progressing into employment, education/training, unemployed.</p> <p>Duration and rate of progression into learning and/or work <i>e.g. duration of time spent on unemployment register.</i></p> <p>Keeping track of the progress of individual advisees from careers providers to the next stage of their employment career path or of the education and training process <i>e.g. nos of individuals no longer claiming benefits as a direct result of specific intervention</i> <i>e.g. nos of reduced drop-out rates from schooling, FE and/or HEIs and cost implications</i> <i>e.g. transfer rates from NEETS into education, training and/or employment</i></p>	<p>School leaver and student destination measures NEET monitoring system</p> <p>Register of clients and intervention measures</p> <p>Pre- and post-treatment assessments.</p> <p>PES and careers service data sharing</p>
<p>Cost (Societal) benefits to individuals</p>	<p>Sustained and/or increased household income</p> <p>Improved employability</p>	<p>Reduced dependency on welfare benefits through training and/or employment <i>e.g. higher earnings/ salary</i></p> <p>Higher wage levels through higher qualifications</p>	<p>- Measuring the Effectiveness of IAG Provision - Identification of Best Practice And Evidence-Based Case Studies of Best Practice for Different Client Groups - Systematic recording systems by practitioners</p>

