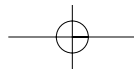


CeGS
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Guidance Studies

REPORT

Guidance and Individual Learning Accounts

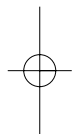
Sara Bosley
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Charles Jackson
A.G. Watts



This report presents the results of a CeGS/NICEC project on the role of formal and informal guidance in support of Individual Learning Accounts. It draws on five case-studies of good/interesting practice in implementing this role, including learner profiles, and supported by a literature review. It concludes that guidance can play a significant role in engaging non-traditional learners; that it needs to be marketed more effectively; that a strategy is needed for funding for in-depth guidance; and that the use of ILAs themselves as a route for such funding should be encouraged.

Sara Bosley and Amal El-Sawad are CeGS Associates; Deidre Hughes is Manager of the Centre for Guidance Studies at the University of Derby; Charles Jackson is a NICEC Fellow; Tony Watts is Director of NICEC and Visiting Professor of Career Development at CeGS.

The National Institute for Careers Education and Counselling (NICEC) is a network organisation initiated and supported by the Careers Research and Advisory Centre in Cambridge. It conducts applied research and development work related to guidance in educational institutions and in work and community settings. Its aim is to develop theory, inform policy and enhance practice through staff development, organisation development, curriculum development, consultancy and research.



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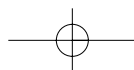
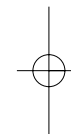
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A partnership between



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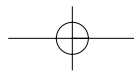
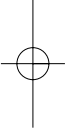
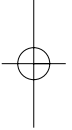
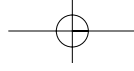
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Guidance and Individual Learning Accounts

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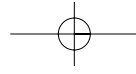
Centre for Guidance Studies
University of Derby
September 2000



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Executive Summary

Aim and objectives

The project reported here aimed to clarify the role of formal and informal guidance in support of ILAs, and to identify models of good and interesting practice for implementing this role. The specific objectives were:

- to identify key policy issues related to the role of guidance in support of ILAs;
- to analyse examples of current guidance practice, in and around the workplace, relevant to these issues;
- to make recommendations on ways in which guidance can best be delivered to support the national framework of ILAs.

Methodology

The research consisted of three stages:

- a literature review exploring guidance-related issues relevant to current ILA policy developments;
- a questionnaire survey of careers services on the extent and nature of their current activities in supporting or delivering guidance in the workplace (the full results from this survey are reported separately);
- five case-study visits to investigate examples of good/interesting practice on guidance in and around the workplace.

This report is based primarily on the findings from the case-studies, drawing on adult learner experiences, and supported by relevant findings from the literature review.

Marketing ILAs

The role of guidance in ILAs is closely linked to the issue of how ILAs are to be marketed. ILAs are most likely to engage non-traditional learners if marketing is specifically targeted at them and involves:

- informal, face-to-face marketing methods;
- intermediaries who are known to non-traditional learner groups;
- a 'hook' or incentive which attracts non-traditional learners.

Access to guidance needs to be an integral part of such a marketing strategy, though it also merits attention in its own right.

Demand for guidance

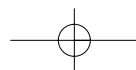
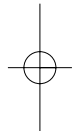
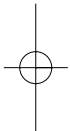
If guidance is to be accessed by those who most need it, it too needs to be marketed. This means that:

- the concept of guidance needs to be clarified;
- an appropriate language needs to be developed to describe guidance;
- an identifiable image of guidance needs to be presented.

Reported low levels of demand for guidance may reflect lack of understanding of the concept and value of guidance, or difficulties of access, rather than absence of 'need'.

Guidance providers and partnerships

Non-traditional learners are more likely to access and benefit from in-depth guidance where 'front-line intermediaries' effectively diagnose their need for such help and/or encourage potential learners to seek in-depth guidance. Impartiality is critical in determining whether a source of guidance is effective in helping learners to make well-informed decisions. Potential learners are most likely to use guidance services that they regard as accessible. This calls for an understanding of the barriers to using guidance services and the motives which might attract learners to use such services. Convenience of provision and trust in the provider are crucial.



Roles of guidance

Guidance can be viewed as serving a number of purposes:

- helping to overcome psychological barriers to learning;
- negotiating access to learning, including release for learning and flexible work patterns;
- identifying learning options, including different courses and modes of learning, which learners would not otherwise have considered;
- encouraging learners to continue to progress their learning (without guidance, learners – especially inexperienced learners – are more likely to choose inappropriate courses, have negative experiences and so lose interest);
- supporting learners through confidence-building, and helping them to sustain their motivation;
- moving behind and beyond immediate learning issues to identifying and exploring career aspirations, and focusing and clarifying goals;
- raising aspirations.

Information, advice and in-depth guidance to address these issues may be needed at any stage in the learning process.

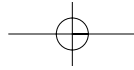
Funding guidance

There is a widespread view that free access to information and advice is insufficient, and that some funding to support in-depth guidance is required, especially to engage and support non-traditional learners on low incomes or those seeking entry to the labour market. Some learners are very willing to pay for in-depth guidance from their ILAs, but some are not.

Conclusions and recommendations

Guidance can play a significant role in establishing a lifelong learning culture and engaging non-traditional learners. Achieving this requires the effective marketing of guidance, the existence of specific success criteria, and creative approaches to guidance policies and delivery plans. In particular:

- Guidance needs to be marketed more effectively to stimulate appropriate demand at all stages in the guidance process.
- Key success criteria are that guidance should be impartial, high-quality, and timely.
- Creative approaches need to include outreach, partnerships, brokerage, and viewing guidance as a developmental process.
- A strategy is needed for funding of in-depth guidance, incorporating a mix of publicly-funded, fee-paying and 'embedded' provision.
- The use of ILAs themselves as a route for funding of in-depth guidance should be encouraged.



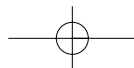
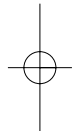
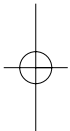
Preface

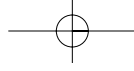
This research report from the Centre for Guidance Studies (CeGS) at the University of Derby builds on a range of activities designed to analyse developments relating to Individual Learning Accounts (ILAs) and the role of guidance. We hope it will inform current and future debates on how best to support adult learners, particularly ‘non-traditional’ learners’.

We are grateful to the Learning at Work Division, Department for Education and Employment, for providing financial support for the study. We have received valuable advice from our Project Steering Group, which has included Gerry Beetles (Executive Chairman, Davis Derby Ltd.), Su Freund (Higher Executive Officer, DfEE), Denise Haslam (Head of Careers, University of Derby), Simon Hemmings (Business Improvement Facilitator, Rolls Royce plc, Derby), Rob Mayall (Careers Services National Association), Mike Nelson (Head of the Trade Union & Education Centre, Mackworth College, Derbyshire) and Alastair Thomson (Policy and Development Officer, National Institute for Adult Continuing Education).

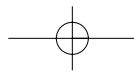
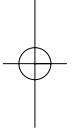
We are greatly indebted to all the organisations who participated in our fieldwork studies, and particularly to the staff who arranged our visits and provided contacts for us to meet adult learners in their respective areas. We received rich data from those adults who kindly agreed to talk with us: their ‘voices’ and ‘stories’ are an important part of this report (pseudonyms have been used to protect their privacy). Finally, we wish to express our appreciation to Avis Butcher, Maureen Flanders and Rachel Satchwell for providing invaluable secretarial support for the project.

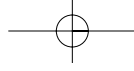
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8 | GUIDANCE AND INDIVIDUAL LEARNING ACCOUNTS





1 Introduction

Background

1.1 The first major articulation of the concept of Individual Learning Accounts (ILAs) was in the report of the Commission for Social Justice (1994). The Labour Party (1997) included in its General Election manifesto a commitment to launch a million such accounts. The Government subsequently added a further commitment to launch a UK-wide framework, based on discounts off the costs of eligible courses for those purchasing them through ILAs (DfEE, 1999a).

1.2 In the context of the Learning Age Green Paper (DfEE, 1998a) and the earlier Fryer Report (NAGCELL, 1997), ILAs are seen as a potential vehicle to:

- address non-traditional learners;
- remove barriers to learning;
- promote a shared responsibility for learning;
- establish part of a national strategy to transform the UK culture in respect of learning.

1.3 The Government has also identified ILAs as having a role in:

- creating a more skilled workforce;
- encouraging people to take more responsibility for their own development;
- making more people aware of the benefits that learning could have for them;
- increasing the amount of private money put into learning (DfEE, 2000).

1.4 In an initial policy statement (DfEE, 1998b) the Government stated that ILAs would be built on two key principles:

- that individuals are best placed to choose what and why they want to learn;
- that responsibility for investing in learning is shared between the Government, employers and individuals.

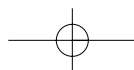
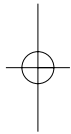
1.5 To inform the development of ILAs, 12 Development Projects (referred to in this report as ILA ‘pilots’) were operated by Training and Enterprise Councils (TECs) between July 1998 and February 1999. These were evaluated by SWA Consulting (1999a; 1999b). The Further Education Funding Council (1999) subsequently announced the allocation of £2m for additional local ILA Pathfinder Projects within the further education sector.

Current government policy on ILAs

1.6 Current Government policy focuses on a model that is akin to a membership scheme. ‘Members’, i.e. ILA holders, can receive certain incentives – at this stage mainly discounts on the cost of eligible learning. The first one million members will receive a contribution of £150 from the Government, against a small personal contribution. Thereafter, members will be able to claim 20% discounts on a wide range of learning. A limited number of specified Information Technology (IT) and Key Skills courses will attract 80% discounts.

1.7 Anyone aged 19 or over will be able to open an ILA, although the Government is particularly concerned to attract people whose experience of learning has been limited. The Government is also keen to encourage people in employment who want or need to update or change their skills.

1.8 In the main, eligibility for ILA incentives is based on the particular course or type of learning, rather than the individual undertaking that learning. For example, higher education courses (e.g. degree or HND) will not attract incentives, but this does not preclude a student from becoming an ILA holder. The student will qualify for incentives should they undertake other eligible learning. Incentives will not be available on learning that is already being paid for from another source like public funds or an employer.



- 1.9** Learners can join the ILA membership scheme by registering with the Individual Learning Account Centre which will inform them whether their intended learning qualifies for any incentives and will calculate discounts. The 80% discounts were piloted by FE colleges from April 2000. In England, the national framework came into effect from 1 September 2000 following enactment of the Learning and Skills Act.

Longer-term policy context

- 1.10** These arrangements provide the main context for the current project. The significance of the project, however, will be determined by the extent to which, in the longer term, ILAs develop beyond the current million accounts. To take the polar extremes, will ILAs, in a historical perspective, be viewed as a one-off initiative on work-based learning, or as the mechanism through which most post-19 (or even post-16) education and training comes to be funded?
- 1.11** The relationship of ILAs to the funding of further and higher education is critical in this respect. Both Kennedy (1997) and the Dearing Committee (National Committee of Inquiry into Higher Education, 1997) were attracted by the idea of ILAs, though they recognised that more work was needed on the details of how ILAs would operate. More recently, the Cubie Committee (Independent Committee of Inquiry into Student Finance, 1999) in Scotland recommended a further analysis of the use of ILAs in supporting students in further and higher education, and specifically recommended that consideration be given to tax breaks under which savings could accumulate in ILAs free of tax.
- 1.12** ILAs could be a way of breaking out of the impasse in relation to funding not only of *learning* (with each of the three beneficiaries expecting the others to pay) but also of *guidance*. Some individuals seem willing to pay for guidance, but only at rates which cover marginal costs rather than full costs. ILAs might be a way of overcoming the marginal-costs barrier to the expansion of guidance provision itself, enabling the guidance to be paid for on a full-cost basis by getting employers and the state to supplement what individuals are prepared to pay (Watts, 1999).

Guidance and ILAs

- 1.13** In the meantime, in 1998 the Government announced a new strategy for information, advice and guidance services for adults (IAGA). Funding of £54m was made available over the three years 1999-2002. This funding is designed to set up a sustainable framework for such services, based on local partnerships which should include community and voluntary groups as well as professional guidance services. The partnerships are co-ordinated by a 'lead body' (DfEE, 1998c). In most of the partnerships that have emerged, the 'lead body' is the careers service company. It is important to note that the £54m funding committed to the IAGA strategy is for information and advice services, not for in-depth guidance (cf. paras. 1.21-1.22 below).
- 1.14** In addition, guidance pre-entry, on entry, during and on exit from learning programmes is currently included in the funding, audit and inspection mechanisms for all learning provision funded by the Further Education Funding Council (see Hawthorn, 1996). Thus guidance is included in the purchase of any such FEFC-funded learning provision. This does not, however, necessarily apply to other learning provision (e.g. that funded through TECs). Moreover, with all post-16 education and training provision now coming under the remit of the new Learning and Skills Council, it seems likely that the role of guidance within such provision will in future be mandated exclusively through the inspection framework (Ofsted/TSC/FEFC, 2000). The adequacy of this approach remains to be tested.



1.15 Guidance is potentially significant in relation to ILAs as a means of reconciling the two key principles underlying ILAs: that individuals are best placed to choose what and how they want to learn; but that the responsibility for investing in learning needs to be shared (between the state and/or employers and/or the individual) (see para.1.4 above). Access to guidance is a means of reassuring the state and employers that individuals' decisions will be well-informed and well-thought-through (Watts, 1999).

1.16 In policy terms, the role of guidance in relation to ILAs could be framed in three different ways:

- As a *free entitlement* within the infrastructure supporting ILAs.
- As a *learning opportunity* in its own right, which individuals can pay for through their ILA.
- As an *external service* which can support ILAs but is outside its scope.

Cross-cutting these categories, guidance in each of these respects could be a *voluntary* or *compulsory* part of the ILA scheme.

1.17 In some ILA pilot areas and in other TEC areas that have been offering ILAs between closure of the pilot stage and the national roll-out, in-depth guidance was offered free of charge. Currently, however, funded in-depth guidance is no longer available as part of the infrastructure of ILAs, nor are learners at present permitted to use their ILA monies to pay for in-depth guidance.

Aims and objectives

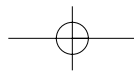
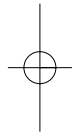
1.18 The project reported here aimed to clarify the role of formal and informal guidance in support of ILAs, and to identify models of good and interesting practice for implementing this role. More specifically, the objectives were:

- to identify key policy issues related to the role of guidance in support of ILAs;
- to analyse examples of current guidance practice, in and around the workplace, relevant to these issues;
- to make recommendations on ways in which guidance can best be delivered to support the national framework of ILAs.

Definitions of guidance

1.19 Confusingly, the term 'guidance' is used both as a generic term, and as a term to describe a specific activity (Watts & Kidd, 2000). Consequently, linguistic and conceptual problems arise in explaining and marketing guidance (see Section 4).

1.20 In its generic usage, 'guidance' covers a range of processes designed to help individuals make informed choices and transitions related to their learning and work. An influential list of such processes was developed by the Unit for the Development of Adult Continuing Education (1986): informing, advising, counselling, assessing, enabling, advocating and feeding back. This drew from an earlier list (Watts, 1980) but was focused more narrowly on educational guidance services for adults and detached guidance from learning provision.

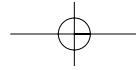


1.21 However, 'guidance' is also used in more specific terms to differentiate it conceptually from 'information' and 'advice'. In recent years this is the definition which has become the common form of usage in government policy documents. Thus the document outlining the national framework for information, advice and guidance services (DfEE, 1998c: 4-5) indicated that the available resources should be focused on 'largely unmediated but comprehensive information', on 'a brief discussion with an adviser, whether face-to-face, on-line or by telephone', and on "signposting" advice to further sources of information, and guidance, including those for which a charge is levied'. The latter reflects the recognition that 'some adults have a need for a more tailored service, which may include an in-depth guidance interview'.

1.22 For the purposes of the present report, the working definitions adopted in a NICEC policy consultation for DfEE (Corney & Watts, 1998) are used:

- *Information*: data on learning and work opportunities conveyed through printed matter, audio-visual materials or computer software, or through information officers in careers services or helpline services such as Learndirect.
- *Advice*: providing an immediate response to the needs of clients who present an enquiry or reveal a need that requires more than a straightforward information response. Advice is usually limited to helping with the interpretation of information and with meeting needs already clearly understood by the client, and may or may not include signposting to a guidance interview where a more in-depth response can be provided.
- *In-depth guidance*: helping clients to explore a range of options, relate information to their own needs and circumstances, and to make decisions about their progression in learning and/or work. In-depth guidance may or may not include psychometric assessment. It may be delivered one-to-one or in groups.

'Guidance' is used in a broad sense to include information and advice, help provided by non-guidance professionals, and the guidance elements of learning provision, as well as in-depth guidance.



2 Methodology

- 2.1** The project reported here has been conducted in three stages:
- a literature review exploring guidance-related issues relevant to current ILA policy developments;
 - a questionnaire survey of careers services on the extent and nature of their current activities in supporting or delivering guidance in the workplace (the full results from this survey are reported separately – see Jackson, Watts, Hughes, Bosley & El-Sawad, 2001);
 - five case-study visits to investigate examples of good/interesting practice on guidance in and around the workplace, drawn mainly though not exclusively from the ILA pilot projects.

- 2.2** This report focuses mainly on findings from the case-studies. The present section outlines the rationale for selecting these case-studies, and difficulties encountered in the fieldwork.

- 2.3** The research for the project was conducted prior to the national launch of ILAs, at a time when twelve ILA pilot projects had reached completion. Three of our case-studies were ILA pilot projects, and although they had been evaluated as part of the ILA national pilot evaluation (SWA, 1999a; 1999b), limited emphasis in this evaluation was placed on the role of guidance. In order to explore this aspect more fully, case-studies were initially selected on the basis of the different models of guidance provision they offered. In addition, the intention was to devote particular attention to:

- practice in small and medium-sized enterprises (SMEs) as well as large organisations;
- links with organisations' Human Resource Development (HRD) strategies;
- the role of guidance performed by trade unions;
- forms of support offered by careers services and other external guidance providers, e.g. further education colleges.

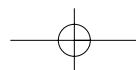
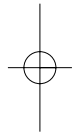
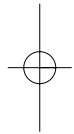
- 2.4** The research team focused particularly on the role of guidance in:

- activating potential learners;
- helping them to make decisions on what to learn;
- implementing these decisions.

In addition, the role of different modes of guidance was examined, including one-to-one interviews, group work, and the application of information and communication technologies (ICT).

- 2.5** In the light of these criteria, the following case-study areas were selected:

- Stockport and High Peak Training and Enterprise Council (SMEs and further education colleges were reported to have active involvement in ILA developments).
- Merseyside Training and Enterprise Council (trade-union participation was reported as instrumental in the development of ILAs in Merseyside).
- Dorset Training and Enterprise Council (guidance was a compulsory element within the ILA pilot project).
- London East Training and Enterprise Council (active links between the local careers service, London East TEC and local businesses were reported to be well-developed).
- The Peugeot Motor Company Assisted Development Programme (an example of good/interesting practice within a larger employer organisation, outside the ILA pilot projects).



2.6 In each case, where possible and appropriate, the following ‘key informants’ were interviewed:

- A project manager (or representative) charged with overseeing the ILA project.
- A guidance worker involved in the delivery of guidance to ILA holders.
- An employer representative.
- A trade-union representative.
- Up to five ILA holders (including non-traditional learners).

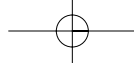
Most informants were interviewed face-to-face, although on occasion, when access/availability difficulties occurred, it was necessary to conduct telephone interviews: this did not adversely affect the depth or quality of the information gathered. At Peugeot, the Training Programmes Manager, the Key Skills Co-ordinator, the former guidance worker (now the Lifelong Learning Manager for Coventry and Warwickshire) and five non-traditional learners were interviewed.

2.7 The case-study approach provided access to information from this range of key informants about the role of guidance in relation to ILAs and to lifelong learning in general. Evidence was gathered from a wide range of people with a personal and/or professional stake in guidance and/or lifelong learning. In particular, the research team sought to access ‘learners’ voices’ and to hear their stories, including those parts that related to the impact of guidance on their learning activity. Clearly, in-depth case studies limit the number of people who can be surveyed: rather than gathering a little information from a lot of people, a lot of information is accessed from a small number. The drawback is that findings from this study cannot be readily generalised to the population as a whole. Nevertheless, the views expressed by our informants are reasonably consistent.

2.8 The research team experienced some difficulty in accessing ILA holders, particularly those who had received guidance. In most cases the TEC (and sometimes the careers service companies) assisted in providing contact details of ILA holders, but there was often no way of knowing whether these individuals had received any guidance and/or were non-traditional learners. This was not always the case, however, and in some of the case-studies face-to-face interviews had been set up – as requested – with non-traditional learners who had been recipients of guidance.

2.9 More generally, there was often difficulty in gathering data because (with the exception of Dorset) the ILA pilots had not focused significantly on guidance or other forms of help to learners. Data had not been collected from learners or collated; nor had learners’ progress been tracked; and evaluation of guidance was not, by and large, built into the design of the ILA pilots. This is unsurprising since the primary objectives of the pilots were to test a range of other aspects such as financial and information technology structures. Evidence of guidance activity was sometimes impossible to trace, even when it was supposed to have been in place.

2.10 In addition, the short timescale in which TECs were required to achieve targets encouraged the collection of limited questionnaire data rather than the more qualitative data we sought. In some instances, co-ordination and communication between TECs, careers service companies and others involved in ILAs were limited, and this further hampered attempts to gather evidence. Despite these limitations, we believe that our data provide a valuable illumination of the role of guidance in relation to ILAs.



3 Marketing ILAs

Introduction

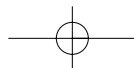
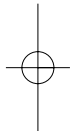
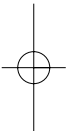
- 3.1** The place of guidance in relation to ILAs needs to be examined in the context of the processes of marketing ILAs. The ways in which ILAs were marketed affected the types of learners who applied for ILAs, and in particular the extent to which non-traditional learners were accessed: this in turn had a bearing on the demand for guidance. Moreover, from a marketing perspective, guidance can be seen as part of the marketing strategy.
- 3.2** Marketing of ILAs took place at several levels, emanating from TECs and involving other partners such as careers services, trade unions and learning providers. Five models of marketing were identified, sometimes co-existing:
- Untargeted marketing to potential learners.
 - Untargeted marketing to employers.
 - Targeting potential learners.
 - Targeting employers.
 - Utilising intermediaries.

Untargeted marketing to potential learners

- 3.3** The issue of how best to reach out and access potential learners, in particular non-traditional learners, was explored. Our findings highlighted at least six differing approaches used to attract adult learners:
- *Advertisements and leaflets.* In Dorset a brief advertisement in an adult education brochure was the only formal marketing activity undertaken. Leaflets were distributed to libraries and information points in some areas, such as Stockport and High Peak.
 - *Use of websites.* London East TEC and Future Careers Guidance jointly developed web-based information aimed at potential learners.
 - *Local press.* After marketing through intermediaries, Stockport and High Peak TEC staff advertised in a local free newspaper. Merseyside TEC used the local press after the pilot. Others chose not to use the press because they were already reaching their targets.
 - *Identifying learning champions.* In some areas, training or personnel staff acted as 'learning champions' in promoting ILAs to employees. In some instances, this promotion was directed at a specific group; in others, all employees were encouraged to take out an ILA.
 - *Trade-union representatives.* In some cases, trade-union representatives played a key role in untargeted marketing within organisations. For example, in Merseyside they promoted ILAs through visits to workplace canteens during break periods. Trade-union representatives in Merseyside were active in distributing information about ILAs and discussing them with employees.
 - *Other word of mouth.* In many cases, ILA applications were largely generated through more general word-of-mouth means (see para. 3.8 below).

Untargeted marketing to employers

- 3.4** Untargeted marketing to local employers was undertaken in a majority of the ILA pilot project areas. For example:
- *Information packs* about ILAs were distributed to employers, including SMEs.
 - *Telephone follow-up calls* were organised to discuss ILAs with employers and visits to interested companies were arranged.
 - *TEC 'direct contract' teams* promoted the benefits of ILAs, along with other 'learning products' such as Investors in People and Modern Apprenticeships. In Stockport and High Peak, ILAs were initially promoted to employers via the TEC's 'direct contract' team. ILAs were seen as providing leverage to encourage employer involvement in other training-related initiatives.
 - *Network contacts* were commonly used to promote ILAs to employers. In Dorset, ILAs were promoted by the TEC via a network of local contacts.



Targeting potential learners

3.5 From our research, three main approaches were identified as strategies for targeting potential learners:

- Some targeted *specific groups*, particularly non-traditional learners. For example, a trade-union representative in one local authority adopted a strategy of targeting a group of employees who had previously had limited opportunity to access training opportunities. Similarly, at Delta Printing, the Production Manager who had volunteered to act as a ‘learning champion’ targeted office staff who hitherto had inadvertently missed out on training initiatives.
- Some targeted *individuals*. For example, Future Careers Guidance staff distributed handbills to commuters at tube stations and bus stops, with the intention of reaching people who lived locally and had few qualifications, especially those who might be interested in IT and basic skills. The flyer promoted ILAs as a means of helping individuals to improve their career prospects.
- Some targeted potential learners through a *collective marketing* approach. For example, in Dorset, the Graphical, Paper and Media Union (GPMU) and Dorset TEC encouraged GPMU members to engage in upskilling by training on industry-specific software.

Targeting employers

3.6 Strategies adopted to attract employer involvement in ILAs included:

- *Targeting specific employers*. In some areas such as Merseyside, staff from the TEC, Careerdecisions and Bargaining for Skills (BfS) were jointly involved in introducing trade-union representatives and personnel staff to ILAs. This approach was thought to improve credibility with their employers.
- *Targeting small and medium-sized enterprises (SMEs)*. For example, in East London, Future Careers Guidance promoted ILAs via their small-employer team.

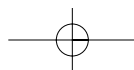
Utilising intermediaries

3.7 Intermediaries often had an important role in promoting the benefits of ILAs. Our findings showed that:

- *Learning providers* were viewed by the ILA pilots as key intermediaries for disseminating information on the benefits of ILAs to adults. London East TEC, Stockport and High Peak TEC and Merseyside TEC all provided information and/or ran briefings for further education college staff and private training providers.
- *Trade unions* played a major role in supporting non-traditional learners to access learning opportunities. In most cases, they also had access to the entire workforce, which provided a very strong lever towards stimulating and engaging adults’ interest in learning and personal development. For example, London East TEC promoted ILAs through partnership with Bargaining for Skills (BfS).
- *Careers service organisations* in some areas adopted a highly proactive role in disseminating information on ILAs. For example, Future Careers Guidance (East London) wrote to training providers informing them about ILAs and their role in supporting adults with their career decisions.

Effects of marketing

3.8 Word of mouth seemed to be one of the most effective methods of marketing, with current learners generating interest amongst other potential learners. This appeared to be the case in marketing not only ILAs but also learning in general.



Paul (see Learner Profile 1 in Appendix 5) is 47 years old and has worked in a car manufacturing company for 11 years. He has no qualifications and has not engaged in any formal learning activity since leaving school. Paul is coming to the end of on-site key skills courses in Maths and IT. His job involves using a computer but little training is offered and no help is given on the shop floor. Paul says the learning activity he has undertaken has been 'very enjoyable' and the (one-to-one) help his tutor has provided has boosted his confidence no end. Paul has recommended the Assisted Development Programme (ADP) to his work colleagues and several have followed in his footsteps, enrolling on CLAIT and other on-site courses.

3.9 A postal survey of 1,752 account holders (response rate 45%) in Dorset conducted in October 1999 found the most frequently cited sources of information about ILAs to be:

- 31% – family and friends
- 30% – employer/manager
- 15% – learning providers
- 13% – work colleagues
- 10% – media
- 1% – union

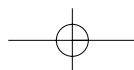
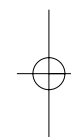
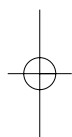
3.10 It was widely believed that ILAs attracted mainly 'dead-weight' learners (i.e. individuals who would have participated in formal learning anyway) as opposed to non-traditional learners. This view was supported to some extent by evaluations of ILAs conducted by HRDU (1999) and SWA Consulting (1999a) which estimated 'dead-weight' at 40% and 50% respectively. However, Dorset TEC's survey of account holders, based on significant data, resulted in a much lower 'dead-weight' estimate of 13%.

Katie (see Learner Profile 6 in Appendix 5) is a 24-year-old graduate currently employed as a Tax Assistant and studying for tax exams. A year ago she contacted a language school with a view to enrolling on a 2-week intensive Training English as a Foreign Language (TEFL) course. The language school told her about ILAs and she decided to apply to assist her with the cost of the TEFL course. She admits she would have enrolled on this course anyway though the additional funds were very welcome.

3.11 There was also some evidence that marketing encouraged 'substitution', with employers using ILAs to supplement or replace the organisation's training budget. This is counter to the Government's original intention (DfEE, 1999), and tends to be associated with limiting or completely removing learner choice, particularly in cases where employers promote task- or job-specific training. Engaging groups as opposed to individuals in ILAs may have a similar effect.

3.12 In Dorset, 18.3% of account holders indicated that they did not yet have NVQ2 or 4 GCSEs at grades A-C (or equivalents). Figures for other areas do not appear to have been collected and therefore cannot be reported.

3.13 Within the ILA pilots, success was achieved in attracting non-traditional learners where efforts were made to target this group or where a large proportion of the workforce in a targeted organisation fell into this category. In several private companies and some local authorities, low-skilled workers with little or no recent experience of learning were attracted to learning at least in part because of targeted efforts to engage them. For example, this was the case with the Assisted Development Programme (ADP) at Peugeot (outside the ILA pilot projects), where the efforts of the Key Skills Co-ordinator had proved instrumental in encouraging non-traditional learners back to learning (see Appendix 1).

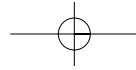


- 3.14** In some models, trade-union intermediaries were crucial. A co-operative and co-ordinated approach involving a number of different parties – the TEC, careers service companies, trade unions and employers – was also considered to be significant in accessing non-traditional learners. Prime examples of this were the GPMU project in Dorset (see Appendix 2) and Careerdecisions' work in Merseyside (see Appendix 4).
- 3.15** There appeared to be limited success in involving companies with fewer than 50 employees. An exception was the GPMU project in Dorset where 18% of account holders were from SMEs. In Merseyside, too, progress was being made in reaching employees in SMEs, with larger companies opening their learning centres to SMEs and the wider community. This type of arrangement has great potential for widening access to learning and resources.
- 3.16** Several key informants reported ICT to be an effective 'hook' or incentive for learning. For example, the Key Skills Co-ordinator at Peugeot received at least one phone call a week from an employee who either had bought or had plans to buy a personal computer, often 'for the children', and wanted to learn how to use it. Peugeot had used this 'hook' to attract around 200 non-traditional learners into learning in the last four years. After a year of on-site learning, the co-ordinator explained, learners' confidence began to increase. After the second year of learning, many would go on to a further education courses at the local college.

John (see Learner Profile 3 in Appendix 5) is 48 years old and has worked on the shop floor for a major car manufacturing company for 13 years. His last formal learning episode was in 1972. Recently he bought a computer for his children and, after seeing an advert in the company newsletter, approached the Key Skills Co-ordinator. He is now enrolled on the in-house CLAIT course which he is 'enjoying very much'. He receives ongoing support from his tutor and from fellow learners.

Key messages

- 3.17** ILAs are most likely to engage non-traditional learners if marketing is targeted at this group and involves:
- informal, face-to-face marketing methods;
 - intermediaries who are already known to non-traditional learner groups;
 - a 'hook' or incentive to stimulate adults' interest and motivation to access and participate in new learning opportunities.
- Access to guidance needs to be an integral part of such a marketing strategy, though it also merits attention in its own right.



4 Demand for Guidance

Marketing guidance

- 4.1** Guidance in general, and in-depth guidance in particular, needs to be marketed effectively if potential beneficiaries are to be attracted to take advantage of it. Several key informants described guidance as ‘a difficult product to market’ and found their attempts at marketing it being hampered by a number of (often interrelated) factors:
- *Conceptual* problems in terms of failure to understand what guidance actually comprises.
 - *Language* problems in terms of the gap between the professional language of guidance (see paras. 1.19-1.22) and popular usage.
 - *Image* problems in terms of negative connotations sometimes associated with the term ‘guidance’.

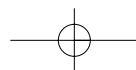
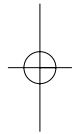
- 4.2** The image and language problems associated with guidance have been analysed by Wilson & Jackson (1998) who reported that the term itself was ‘impenetrable to a significant number’ of individuals. A GPMU representative explained:

“Guidance is a completely new concept for our members. For the mass of working people, the view is ‘we don’t have careers, we have jobs’. People who go to university have careers, people in professions have careers and it wouldn’t even cross the mind of an ordinary working person that there’s anything in career guidance for them.”

A Bargaining for Skills (BfS) representative in Merseyside expressed the view that, in general, people do not know they want a careers interview ‘until they’ve had it’. An IAGA Network Co-ordinator commented:

“We haven’t got the right language to communicate with people. Writing leaflets and flyers is very difficult. It’s very difficult to talk about information, advice and guidance as well as learning and skills and work. There are six or seven terms which individuals have to unravel. These terms have to be ‘unpacked’ sufficiently well for people to realise guidance and learning would be helpful for them.”

- 4.3** Several key informants suggested that low take-up of guidance in some areas (see below) could, at least in part, be attributed to the term ‘guidance’ and its value being poorly understood by employees and employers. However, it seemed that guidance had not always been very actively promoted.
- 4.4** Where it had, the word ‘guidance’ was often played down. Careerdecisions (see Appendix 4) took care over the language used in their flyer to market guidance, preferring informal words such as ‘discussion’ to more formal words like ‘interview’. Dorset Careers consciously avoided using terms such as ‘careers’ (although as yet the name of the organisation remains unchanged) and ‘guidance’, preferring ‘focused consultation’ for the latter. Their information and promotional materials on their adult services had been renamed ‘Prospects’, in view of the fact that adult clients visiting branches frequently explained that what they wanted was better prospects.
- 4.5** In some areas, trade-union representatives helped to overcome some of these difficulties by playing a critical role in encouraging employees to take up guidance. Word of mouth was also important here: employees who felt more focused and confident after their guidance interview with the careers adviser then, in turn, acted as ‘champions’ to promote the benefits of guidance to others.



- 4.6** Non-traditional learners, who were considered by our informants to be most in need of guidance, were viewed as the hardest to reach. The District Secretary of the Workers' Educational Association in the Dorset Region was quoted as commenting:

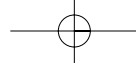
“A leaflet offering ILAs with a guidance session...is no replacement for the partnerships and outreach work carried out by some providers. Guidance is for many new non-traditional learners a daunting step in itself to take” (Payne, 1999a: 14).

Expressed demand

- 4.7** Our survey of careers service companies (Jackson, Watts, Hughes, Bosley & El-Sawad, 2001) found that some careers advisers anticipated an increase in demand for some guidance services as a result of ILAs (in particular, brief advisory interviews). There was some concern that if guidance were effectively marketed and funded through public funds and/or through ILA funds, the floodgates would open, generating an unmanageable level of demand. But there was little hard evidence to support this fear.
- 4.8** From our findings, expressed demand from adults for guidance services was variable. Information from the Merseyside pilot showed that out of a sample of 720 ILA applicants, 111 reported having received some form of guidance in relation to the learning they intended to undertake; of these, 44 said they had received in-depth guidance.
- 4.9** With the exception of Dorset TEC, where in-depth guidance was mandatory, the greatest expressed demand was for information and advice rather than for in-depth guidance. A survey conducted after the mandatory guidance period in Dorset of 1,752 account holders for whom guidance was voluntary (response rate 45%) revealed that 36% had opted to access ‘advice and guidance about what to study’ (Payne, 1999b).
- 4.10** However, caution needs to be exercised over the interpretation of an apparent lack of demand for guidance. Our findings show that, in some cases, account holders felt they needed little or no guidance on entry as they were already ‘committed’ learners (Sargant & McIntosh, 1995) or ‘improver learners’ (i.e. learners who were taking action to better themselves and knew what they wanted to learn) (MORI, 1996).

Hidden demand

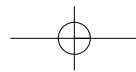
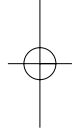
- 4.11** Those who did not seek guidance in the ILA pilot projects might nonetheless have benefited from discussing their ideas and options with a guidance worker. In Dorset, where guidance was mandatory in the early pilot scheme, 84% of account holders had decided what to study before applying for their ILA. Despite this, 78% rated the guidance they received as being very or quite useful (Payne, 1999a). A Careers Adviser indicated that:
- “Many were found to have chosen courses in a fairly *ad hoc* way, without always thinking about where it would lead. Many were also glad to hear of alternative options that might potentially make better use of their money or be more appropriate to their personal development plans.”
- 4.12** Guidance may play a particularly important role in engaging ‘potential customers’ (Sargant & McIntosh, 1995). The ‘not for me now’ and ‘outsider’ learners, most of them non-traditional learners, are widely recognised as being in most need of guidance and yet paradoxically being least likely to demand or access it. For these less or uncommitted groups, in-depth guidance may prove to be ‘an important element of their return to learning, possibly even an essential pre-requisite’ (SWA, 1999b: 28).

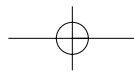
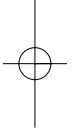
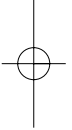
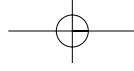


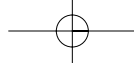
- 4.13** It is also possible that when learners request ‘information’ and ‘advice’, they are seeking help which might be defined as in-depth guidance by the providers of that help. Learners may find it difficult both psychologically and linguistically to articulate such a need. This point was made by staff within Peugeot who were fully aware of how difficult many people find it to admit that they need help, in terms both of learning and of guidance. This is true in particular of individuals who have problems with basic skills. Outreach work was viewed as crucial in bringing help to such individuals.

Key messages

- 4.14** If guidance is to be accessed by those who most need it:
- the concept of guidance needs to be clarified;
 - an appropriate language needs to be used to describe it;
 - an identifiable image needs to be presented;
 - a range of different marketing strategies needs to be adopted, with emphasis on creative ways of reaching non-traditional learners.
- 4.15** Our evidence on expressed and hidden demand for guidance suggests that:
- for uncommitted learners, in-depth guidance may prove to be an important element of their return to learning, possibly even an essential pre-requisite;
 - low demand for in-depth guidance may reflect a lack of understanding of the concept and value of guidance, or difficulties of access, rather than an absence of ‘need’.







5 Guidance Providers and Partnerships

Introduction

5.1 The main identifiable providers of guidance are described below. However, it is misleading to assess each provider in isolation from the others. Although a single guidance provider may offer a valuable service, it is often the partnerships between different providers that attract and engage those potential learners most in need of help and that enable them to make well-thought-out choices.

5.2 Themes that emerged from our fieldwork in relation to partnerships included:

- the importance of *brokerage*, whereby appropriate learning opportunities are secured for learners through the intervention of others;
- the role of *front-line intermediaries*, who provide some immediate guidance support and can help those who need in-depth guidance to access it;
- the importance of professional guidance services conducting *outreach* work;
- concerns about the *impartiality* of some guidance providers.

These issues will now be considered, where relevant, in relation to each of the main guidance providers.

Careers Service Companies

5.3 In-depth guidance was offered by all of the careers service organisations within the five case-study areas, with the exception of Stockport and High Peak. In the latter area, it was offered by the TEC's Pathfinder Centre, largely because at that time the local careers service company was concentrating on its core service to young people.

Brokerage

5.4 In some areas, careers advisers were involved in negotiating on-site tuition in popular subjects, flexible provision such as 'roll-on, roll-off' courses, and time off work to learn. Informants indicated that the brokering process could become complicated and time-consuming when more than one further education college was involved.

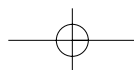
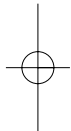
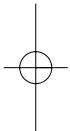
Outreach

5.5 Our findings indicated a strong recognition of the need for careers service staff to engage in outreach work if non-traditional learners were to be encouraged back into learning. A guidance worker summarised this as follows:

“You have to take it out to those people, make it relevant and make it attractive on a very practical level for them.”

Peugeot's success in this respect was seen as being attributable to outreach initiatives within the company. It employed a guidance worker from the local careers service on a part-time basis. The guidance worker sat in the factory works canteen and chatted to people about learning over a cup of tea.

5.6 Accessibility to in-depth guidance services varied. Where strenuous efforts had been made to market guidance, involve front-line intermediaries and provide in-depth guidance at the workplace, the take-up rate was high. In one employing organisation, the local careers service managed to negotiate access to deliver on-site guidance for employees who wished to take up an ILA. Release from work to attend the half-hour in-depth guidance interview was also secured. Over forty ILA applicants accepted the offer of an interview. This contrasted with another organisation where the careers staff were unable to negotiate on-site guidance in work time. The ILA applicants in this second organisation were given information about the careers centre and its location but it appeared that no-one had availed themselves of the service.



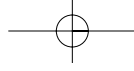
- 5.7** In the GPMU project in Dorset, a group guidance session (followed by individual in-depth interviews for those who requested it) was conducted at the college, where the learning event was delivered in learners' own time at weekends.

Impartiality

- 5.8** In some cases, in-depth guidance interviews were provided at the employees' workplace. As a result of trade-union involvement, most employees did not appear to be concerned about the impartiality of such on-site guidance.
- 5.9** However, some employers did not welcome on-site provision. In one organisation, careers service staff were only able to negotiate limited access, in the form of a display for employees to visit in their breaks. A personnel officer in another organisation said she would welcome the help of a 'qualified guidance worker' in encouraging employees to take responsibility for their own learning, but she declined the services of a 'careers adviser' who she thought would encourage staff to leave. This suggests that careers service organisations need to be sensitive to how they portray their work and to find appropriate ways of promoting the benefits of guidance to employers and employees.

Trade unions

- 5.10** Before the ILA pilots, the Trade Union Congress (TUC) – through Bargaining for Skills (Bfs) – was already active in promoting learning initiatives such as key skills and basic skills, and in supporting individual ownership of learning. Many within the TUC viewed ILAs as an ideal way to engage non-traditional learners. There was also growing awareness of the potentially important role of trade unions in delivering guidance provision (Ford & Watts, 1998).
- 5.11** Some trade-union representatives and other trade-union members are trained as trade-union learning representatives, whose role is to identify individual learning needs, providing accurate up-to-date information, signposting and referral (North West TUC, 2000). Trade-union learning representatives follow an Open College Network-accredited training programme to provide learning information and advice, and some also have relevant NVQ qualifications. They are therefore seen as fulfilling a front-line or intermediary role rather than providing specialist in-depth guidance (Cowen, Clements & Cutter, 2000).
- 5.12** Trade-union representatives were particularly significant in the ILA pilot projects in Merseyside and East London in accessing and engaging non-traditional learners. For example, in Merseyside, because they were trusted and seen to be 'on the side' of employees, trade-union representatives played a key role in encouraging ILA applicants to take up guidance interviews with a careers adviser. This was especially important since many of these employees were non-traditional learners who were uncertain about the value and relevance of guidance. Both the trade-union representatives and careers service staff believed that the role of trade unions was critical to the success of the ILA pilot in Merseyside and in the GPMU upskilling project.
- 5.13** Trade-union representatives helped potential learners to see the value of learning in the context of longer-term employability. For example, one trade-union representative in a local authority encouraged a group of switchboard operators to open ILAs by emphasising the importance of gaining a portable qualification to assist progression within the council and promoting their employability elsewhere.



- 5.14** Peugeot are currently in discussion regarding a government/union-funded project to encourage employees with basic skills needs to undertake learning. As part of this project some individuals will be trained to identify and support those who might benefit most. Other large companies also have learning representatives in place (e.g. Rolls-Royce; AdTranz, Derby). The Training Programmes Manager at Peugeot suggested that such representatives are in an ideal situation to influence non-traditional learners:

“It’s about widening the net of people who act as identifiers. Those most in need are those least likely to come forward, which is why it is so important to encourage them and start building up their confidence. Individuals are more likely to disclose learning needs to colleagues they already know and feel comfortable with.”

- 5.15** However, in some quarters there is a serious ‘capacity problem’. For example, the GPMU office in Wiltshire covers the whole of the south-west region. It should be noted that trade unions are stronger and more highly respected in some geographical areas, industries and organisations than in others. Where they have less influence with managers and employees, their role is likely to be less significant.

Brokerage

- 5.16** Trade-union representatives are well positioned to understand and find out about the learning needs and interests of non-traditional learners and to broker relevant opportunities. For example, in one local authority, trade-union officials were involved in negotiating the establishment of on-site learning centres.

Impartiality

- 5.17** Some employees may have more trust in trade-union representatives than in managers, and it is this trust which makes them effective front-line intermediaries. However, trade unions also have their own agendas, which need to be transparent. For example, in one local authority, where trade-union representatives intervened with training staff to promote ILAs and secure training for employees, non-union employees who benefited were ‘expected’ to join the union.

Learning providers

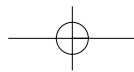
- 5.18** Both private and publicly-funded learning providers were involved in giving information and advice, mainly about the courses they offered. However, there was relatively little evidence in the present research of colleges being approached by learners for information and advice relating to ILAs. Where colleges were mentioned, further probing revealed that it was specific tutors known to and trusted by learners who were regarded as approachable and helpful.

A play-group assistant aged 38 (see Learner Profile 15 in Appendix 5), who used an ILA to help her fund an NVQ level 3 in child care, said that if she needed further guidance about her next step she would go to her tutor and possibly her employer.

Impartiality

- 5.19** Careers service and TEC staff expressed some anxiety about the impartiality of information and advice given by learning providers who might be tempted to recruit learners to inappropriate courses. An IAGA Network Co-ordinator indicated:

“...learning providers admit to not offering impartial advice but rather signposting people to their provision. They admit they know little about what other providers offer and therefore they are unable to be impartial. If you’re buying a new car, and you only go to the Rover garage, then you’re only going to have Rover cars recommended to you – it’s exactly the same principle.”



- 5.20** Without objective information and the opportunity to compare courses offered by different providers, it is difficult for learners to make well-informed decisions. Also, with limited information, learners may choose courses which may seem appropriate but not be the most appropriate for their particular needs.

A guidance worker from Dorset Careers conducted a (mandatory) in-depth guidance interview with a client in his 30s. He had been a shoe-mender all his life, had left school at 14, had never sat an exam and had poor levels of literacy and numeracy. He had completed an aptitude test for computer programming and had been told by a provider of distance learning that he demonstrated a very high aptitude and could be earning £35-40K per annum in 2 years if he completed one of their courses. The client, who had never used a computer before, had signed up for the course which cost 'several thousand pounds'. His guidance worker contacted the provider and managed to negotiate her client's way out of the contract. She advised him to start with a CLAIT course and re-consider programming after he had completed this. This client was one of the lucky ones, according to the guidance worker, for she knew of several people who had spent thousands of pounds on such courses, had successfully completed them and had never secured the kinds of jobs the providers said they would.

Employers

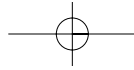
- 5.21** There was mixed evidence of information and advice-giving by employers, especially training and personnel staff. Some played a key role as 'learning champion' by:

- promoting the learning message to senior managers;
- securing resources such as open-learning centres;
- ensuring employer financial contributions to support ILA account holders;
- encouraging potential learners to participate in learning.

In most cases, these individuals were already committed to the idea of learning and had integrated ILAs into a broader in-house company strategic plan.

At Delta Printing (see Appendix 3), staff received information and advice directly from the Production Manager, who had adopted an unofficial role as 'learning champion'. He had taken it on himself to promote learning within the company. He estimated that some 80% of employees were 'non-traditional learners'. He reported many success stories. For example, a man in his 40s, who had never passed an exam in his life, had taken four years to complete his NVQ Level 3. Many times this man had felt that he should give up, that he would never succeed, but with the Production Manager's encouragement he had stayed on the course and was 'chuffed to bits' when he succeeded. Another man in his 30s, married with two children, had no qualifications. The Production Manager encouraged him to do a BTEC/ONC on day release, which he did – and came top of his class. He was now 'chomping at the bit' to do more learning. It was often the case, according to the Production Manager, that one successful learning episode triggered a 'learning bug'.

- 5.22** Significant others in and around the workplace frequently performed the role of coach/mentor in place of (as in the case of Delta Printing) or in addition to (as in the case of Peugeot) a formal guidance worker. Dorset TEC used a peripatetic facilitator who fulfilled a 'brokerage role'. As Payne (1999a: 13) suggests: 'It is likely that there will be an ongoing requirement for such a person where ILAs are targeted at the less skilled and less confident members of our society – those who are least likely to see £25 towards an ILA well spent.'



- 5.23** Some personnel and training staff did not appear to see information and advice-giving as being within the scope of their role. For example, the Personnel Officer in one organisation worked hard at promoting ILAs and secured company funds to support non-vocational learning, but left the process of choosing entirely to the learners.

Impartiality

- 5.24** There may be a sense or expectation amongst some training and personnel staff that employees would not trust their advice. For example, one training officer did not receive any response to his offer of a confidential discussion about work and learning issues. One of the explanations, he suggested, might be lack of trust in those seen as managers.
- 5.25** Some training officers and personnel staff appeared to be directing, rather than advising or guiding, staff. Examples were identified of groups of employees using ILAs to undertake the same job-related training.

At one company, office staff were offered the option of using an ILA to do an NVQ level 3 or 4 from a 'choice' of courses in marketing, sales, business administration and customer support. The company was prepared to contribute £400 to the ILA to cover the full cost of the course. Employees were required to contribute £60.

Not only do such examples illustrate the problem of 'substitution' identified earlier (para. 3.11), but they also suggest a lack of learner choice. It is questionable in such cases whether the employees concerned fully understood the purpose of ILAs or were aware that they could have used ILA funds for *any* work-related training.

Informal sources

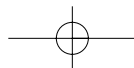
- 5.26** Some learners found about or explored learning opportunities with the help of friends, colleagues and relatives. In many such cases, informal sources of information were used to supplement more formal sources.

Jill, a 32-year-old learning adviser (see Learner Profile 17 in Appendix 5), researched courses in alternative medicine for herself. She spoke informally to other students at the college she was considering, including one who had completed the course that interested her. She also discussed her next step with her tutor.

- 5.27** Payne (1999b: 15-16) in his evaluation of the Dorset pilot project noted:

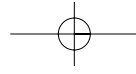
“There is important evidence about how advice and guidance permeates the structures of adult learning, with course tutors, friends and neighbours, college and adult education guidance services all potential players in these processes. References to informal sources (friends, colleagues, family, students on previous courses) were in a ratio of 1:2 with more formal sources (Careers Service, providers, employers, professional organisations). This has important implications for the development of advice and guidance available as close as possible to the places where people live and work and socialise, rather than a 'professional' model dependent on the traditional hour-long guidance interview.”

Our evidence supports this, but indicates that the two models should not be regarded as mutually exclusive.



Key messages

- 5.28** Non-traditional learners are more likely to access and benefit from in-depth guidance where front-line intermediaries effectively diagnose their need for such help and/or encourage potential learners to seek in-depth guidance. This can be achieved by constructing partnerships between informal and formal guidance providers with different skills, knowledge, contacts and relationships. Careers staff involved in constructing such networks found this work time-consuming and complicated, but critical in achieving successful guidance outcomes for learners.
- 5.29** Impartiality is crucial in determining whether particular sources of information, advice and/or guidance are effective in helping learners to make well-informed decisions. In the interests of the learner, there is a case for providing access to guidance services that are based outside the workplace, at least as a supplement to any internal provision.
- 5.30** Although guidance workers and TEC staff were concerned about impartiality, many learners themselves were apparently not, or at least did not recognise this as a major issue. This suggests not that impartiality is unimportant but that learners need to be reminded that 'buyer beware' applies to learning as well as consumer products.
- 5.31** Potential learners are most likely to use guidance services that are accessible in their terms. This calls for an understanding of the barriers to using guidance services and the motives which might attract learners to use such services. From the present research, convenience of provision and trust in the provider emerge as crucial.



6 Roles of Guidance

Introduction

- 6.1** This section explores the roles of guidance in ILAs, and specifically looks at guidance in relation to different stages of the learning process.
- 6.2** Learner Profiles 4, 5, 20 and 21 in Appendix 5 provide evidence of the value of in-depth guidance. Information on *actual* outcomes is not available because guidance providers were rarely able to track their ILA-holder clients. However, guidance staff reported that many ILA applicants whom they interviewed expressed an *intention* to pursue some learning and included this intention in their action plans.
- 6.3** The case-studies provide evidence of guidance prior to a learning episode and as learners approach the completion of an episode, and also a *need* for guidance provision at these and other stages.

Prior to a learning episode

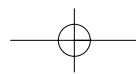
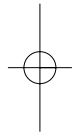
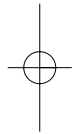
- 6.4** The varying expressed demand for guidance prior to a learning episode has been explored in Section 4.
- 6.5** Effective support in terms of encouragement, confidence-building and motivation were regarded by trade-union representatives, careers staff and TEC staff to be crucial in engaging non-traditional learners. This type of support was provided by trade-union representatives, training/personnel staff, tutors and careers advisers. Perhaps the most enlightening example was at Peugeot (see Appendix 1). The role played by the Key Skills Co-ordinator here appeared to have been important in engaging learning amongst non-traditional learners. She credited her success to ‘patience, tolerance, and understanding’ as well as to what she referred to as ‘transference of confidence’.
- 6.6** Where information about users of in-depth guidance was available, they were found to have needed help with identifying what to learn, often linked to updating or developing skills, or changing careers. Payne (1999b: 15) suggests that:

“The public policy focus should be on how we can match up people’s potential with jobs and learning in ways that make both their work and their learning more purposeful and productive.”

The availability and use of guidance is an important means of achieving this, as illustrated by the example below.

A female personal secretary in her late 40s (see Learner Profile 19 in Appendix 5), who had nursed her mother through a terminal illness and looked after relatives’ children, showed a strong leaning towards care work. After exploring the options with a careers adviser, she decided to train as a care assistant with a view to working with special-needs children.

The careers adviser helped this learner to convert an inclination into a plan.



- 6.7** The existence of dormant ILAs – which were opened and not used – might indicate a hidden need for guidance prior to a learning episode. Possibly some dormant accounts arise from circumstances similar to that described below, where a well-motivated learner was thwarted by practical barriers of money and time.

A 55-year-old male (see Learner Profile 10 in Appendix 5) left school aged 15 without qualifications and was currently working as a full-time cleaner. He described himself as self-educated, using the local library. A few years ago he had completed the first year of a full-time degree course in Business Information Systems but had had to drop out for financial reasons. Using his ILA, he applied for a course in computing, in the hope of getting NVQ certification linked to the learning he had done at university. However, he was unable to start because of a change in his shift pattern.

A broker to help negotiate different shifts, and some discussion of distance learning and/or Accreditation of Prior Experience and Learning with a careers adviser, might have been helpful here.

During a learning episode

- 6.8** There is little evidence in our research of guidance during a learning episode, although some learners' experiences suggested that guidance could have been beneficial in overcoming barriers and sustaining motivation.

A 51-year-old learner (see Learner Profile 14 in Appendix 5) reported that her trainer was unsupportive, undermined her confidence, and discouraged her from taking a qualifying exam.

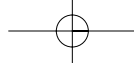
Without help there is a danger that she will drop out of her course and be too disillusioned to try further learning. A skilled broker or advocate might be able to improve the situation and enable her to finish.

A 38-year-old female with 2 children (see Learner Profile 12 in Appendix 5) had left school without qualifications and was currently working in a large supermarket. She had used her ILA to start an IBT2 computer course but did not finish. She reported difficulties in learning about spreadsheets and 'felt a fool having to ask the same thing all the time'. However, the reason she gave for giving up was that she found it too much of a rush to prepare a meal between coming in from work and leaving for her course at 6pm.

It is possible that, with encouragement and identification of alternative learning times, or brokerage to secure release from work, this learner might have felt motivated to continue.

On exit from a learning episode

- 6.9** The need for guidance on exit from a learning episode might be better phrased as 'on anticipation of the end of a learning episode', because once learners have been 'hooked', they may start to think about and plan their next step before completing their current learning episode. There was some evidence of a demand for information, advice and possibly in-depth guidance from learners seeking to focus their future plans.



A driver in his mid-20s (see Learner Profile 25 in Appendix 5) who had recently completed a BTEC in Business and Finance (with distinction) was looking at the possibility of doing a part-time degree in Law. The careers adviser helped him to arrange an interview with personnel staff in his company to discuss redeployment to the Legal Department.

A male road worker and a driver (see Learner Profiles 22 and 23 in Appendix 5), who had progressed from CLAIT through a series of IT courses, sought advice from their IT tutor on the most appropriate Open University options open to them.

- 6.10** There was also some evidence of a potential need or hidden demand for guidance on exit from a learning episode.

A 42-year-old director of a 3-person company (see Learner Profile 16 in Appendix 5) decided to take a typing course to help her with her work. She chose a private training provider which she saw as 'the specialist', and did not consider alternatives offered elsewhere. She 'would not be averse' to further learning, especially about the Internet and about e-mail, but did not know how to find out about courses. She thought she would ask staff at her current provider and at the Citizens' Advice Bureau, and use the Yellow Pages.

Given her interest in further learning, and her uncertainty about sources of learning information, some impartial advice could have been helpful here.

A 48-year-old male learner (see Learner Profile 9 in Appendix 5), who had left school without qualifications, opened an ILA to do a CLAIT course because he 'was tired of being spoken down to by his children'. He is now on an IBT2 course and is keen to continue learning computer skills 'until it gets too difficult or I have achieved what I want to achieve'. He plans to seek advice on his next step from the organisers of EDAP or London East TEC.

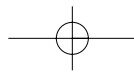
In-depth guidance might help him to focus and clarify his currently open-ended aims.

A part-time secretary aged 53 (see Learner Profile 11 in Appendix 5), who had left school at 15 years old without qualifications, used her ILA to fund a Medical Secretarial course. She enjoyed the course and took very quickly to audio-typing which she described as 'brilliant'. The tutor at the training centre enabled students to do a few days' voluntary work experience at a hospital, which reinforced the learner's view that she would like to pursue a career as a medical secretary.

She would have been interested in speaking to a careers adviser if one had visited the training centre. Some confidence-building and advice might help her to pursue her emerging goal to apply for work as a medical secretary.

- 6.11** These examples support the argument that a major 'gap' lies in guidance at the end of the first learning episode in terms of effecting attitudinal change and promoting sustainability. SWA (1999a) suggests that:

"If changes in attitudes are to be achieved, guidance may have a larger role to play towards the end of initial learning episodes than at the front-end."



Sustaining non-traditional learners

6.12 Whilst traditional learners may be ‘very clued up’, as one careers adviser put it, non-traditional learners need encouragement and help in making their choices. Although our case-study areas included many traditional learners, some low-skilled workers with little post-school experience of learning also took out ILAs (Learner Profiles 20 and 21 in Appendix 5 are good examples). An IAGA Network Co-ordinator said:

“If ILAs are targeted at non-traditional learners, then without guidance they will fail. If it’s about saying one million accounts were opened, there are enough people who will open them without the need for guidance. But if it’s about saying that 70% of account holders were non-traditional learners, then guidance is essential.”

6.13 The Key Skills Co-ordinator at Peugeot believed that everybody could benefit from guidance but in particular that it was ‘absolutely critical’ in engaging non-traditional learners and sustaining their learning. To make her point, she asked:

“How do you get to Greece without a map? You need someone to show you the way.”

6.14 In-depth guidance can have an impact on sustaining learning by helping learners make appropriate choices and satisfactorily addressing any problems that arise during a learning episode. Payne (1999b: 19) reported that:

“On balance, those who receive advice and guidance find studying more enjoyable (because they have thought about their choice), harder (because they are being stretched) and more relevant to their work (because they have had a chance to discuss this interface).”

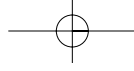
The evidence was stronger on relevance to work than on the other criteria.

6.15 The ILA Project Manager at Dorset TEC offered the following story as one possible scenario if the importance of guidance was not recognised:

“When I was 16 I took a summer job digging ditches in New Zealand. I fancied myself as a bit of a mathematician at the time. There was this old man; he must have been about 60. We got talking about Einstein’s Theory of Relativity.

“This chap knew more about it than anybody I have met before or since. He was totally ill-educated by our standards but he had been to the library and he’d got interested in it and he’d read every book on the subject and it was just his thing. He really, really understood it. Yet he was never going to be anything other than a ditch-digger.

“I’ve always thought that’s where we’re failing. We’re failing someone with obvious potential and we’re sentencing him to a life of ditch-digging because we don’t let him understand that he has the potential to do something else. That’s what happens if we muddle through.”

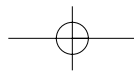
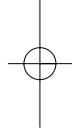


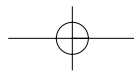
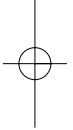
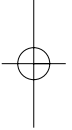
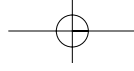
Key messages

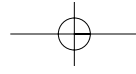
6.16 Interviews with learners and comments from careers advisers and trade-union representatives suggest that guidance can serve a number of purposes:

- help overcome psychological barriers;
- negotiate access to learning, including release for learning and flexible work patterns;
- identify learning options, including different courses and modes of learning, which learners would not otherwise have considered;
- encourage learners to continue to progress their learning – without guidance, learners, and inexperienced learners in particular, are more likely to choose inappropriate courses, have negative learning experiences and lose interest;
- support learners through confidence-building and help them to sustain their motivation;
- move behind and beyond immediate learning issues to identify and explore career aspirations, and focus and clarify goals;
- raise aspirations.

Information, advice and in-depth guidance to address these issues may be needed at any stage in the learning process.



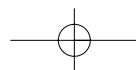
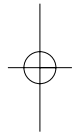
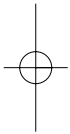




7 Funding Guidance

Source of funding

- 7.1** If guidance is to play an effective part in engaging non-traditional learners, attention needs to be paid to how that guidance can be funded, given that non-traditional learners are unlikely to be in a position to pay for it themselves.
- 7.2** At present, careers service companies remain one of the main providers of in-depth guidance, funding services in three main ways:
- *Publicly-funded services which are free to individuals.* The funding here is from a variety of sources and is often targeted at particular client groups, e.g. unemployed adults.
 - *Fee-charged services to individuals.* Commonly these are costed on a marginal-cost basis rather than at full market rates. They are therefore effectively subsidised by other sources of funding.
 - *Fee-charged services to employers,* which include services made available to employees. These may include outplacement services or broader HRD services. In the latter case, there may be some constraints on the impartiality of the guidance that is offered.
- 7.3** Findings from our questionnaire survey of careers service companies (Jackson *et al.*, 2001) show that although 70% of respondents mentioned individual users' fees and over 40% mentioned fees from employer contracts, in only a small number of cases were these among the three most important sources of funding for in-depth guidance services. Public funding is currently the major source of funding for such services.
- 7.4** The £54m funding committed to the Government's IAGA strategy is for information and advice services, not for in-depth guidance. A DfEE policy statement noted that some adults 'have a need for a more tailored service, which may include an in-depth guidance interview' but also notes that 'for the majority of adults in employment, the Government does not believe there is a compelling case for such services to be universally supported out of public funds' (DfEE, 1998c: 4).
- 7.5** A Lifelong Learning Manager indicated that, although information and advice are now likely to be easier to access, this may be insufficient:
- “The capacity of many individuals, especially non-traditional learners, to interpret that information and advice is often limited. Many people struggle to do so and may as a result end up doing nothing.”
- 7.6** Grave reservations were expressed about the restriction of DfEE funds to information and advice:
- “If all that was needed were a bit of information and advice, a 20-minute session, then [non-traditional learners] would already be in learning. If it were as easy as saying ‘we think you should do a CLAIT course at the local college’, they’d be doing it. The reason that they are not is because they have a whole multitude of issues and problems, access difficulties, and they don’t think it’s for them. It just passes them by. Guidance can support and lift those people but it’s guidance that they need, not advice. Yet there’s very little funded guidance.” (IAGA Network Co-ordinator)



7.7 As in our questionnaire survey of careers service companies (Jackson *et al.*, 2001), the evidence from our case-studies indicated strong support for funding of in-depth guidance in relation to ILAs. Several expressed the view that this should be an integral part of the Government's lifelong learning strategy:

“Guidance is a central thread through the whole process. It is not possible to have a Lifelong Learning Agenda without guidance. The IAG initiative is a good start, which puts in place a minimal infrastructure, but it does not go far enough. Provision for more substantial guidance work, including in particular outreach work, must be included. IAG funding at present does not cover the cost of this.

“For example, the annual funding for this area is £300K, whilst £2m is needed to fund and run outreach programmes. These programmes are essential if any real progress is to be made in changing deep-rooted attitudes to learning and work.” (Lifelong Learning Manager)

Models of funding from the case-studies

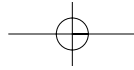
7.8 In the case-studies, a variety of different models were used to fund in-depth guidance to support ILAs:

- *Available free to all ILA applicants/holders.* Merseyside TEC and the TUC's BfS project jointly funded in-depth guidance for the duration of the pilot, and indeed the TEC continued to fund it after the end of the pilot.
- *Available free to some ILA applicants/holders.* In East London, from February 2000 – when European Social Fund (ESF) monies were secured – free guidance had been available to: SME employees, especially those seeking NVQ levels 2 and 3 qualifications or IT skills; returners to employment; and employees needing to improve their maths and English in order to access training.
- *Available (and compulsory) on payment of £25 from ILA funds.* This was the approach adopted by Dorset TEC, with the £25 being supplemented by a £35 contribution from the TEC.
- *Available on payment of £50 from ILA funds.* Before ESF monies were secured (i.e. from July 1999 to February 2000) guidance in London East TEC was funded, where requested, with £50 from the individual's ILA. In Stockport and High Peak, too, learners could use £50 of their ILA to fund guidance.
- *Available on payment from the individual's own funds.* See, for example, Learner Profile 4 in Appendix 5.

7.9 There was no clear evidence of the differential effects of these various models on take-up of in-depth guidance. Such differences as there were might have been attributable to other factors: the methods used to market guidance; learners' understanding of the concept, image and value of guidance; whether ILA holders were traditional or non-traditional learners; and the accessibility of guidance provision.

7.10 At Peugeot, where a guidance worker was seconded on a part-time basis from the local careers service, all employees participating in the ADP scheme were entitled to access a wide range of guidance services as and when required.

7.11 Within the ILA pilot projects, some learners were willing to pay for or utilise ILA monies to fund the guidance they received. According to one careers adviser, a small group of learners were 'very happy' to do so.



A male in his 40s (see Learner Profile 5 in Appendix 5) attributed the recent offer he had received of a new job to an in-depth guidance session. He had paid £25 towards the cost of this session from his ILA. He said he would definitely pay for further guidance in the future if he could afford it, but was concerned that people on low incomes might miss out. He believed that the option of guidance was 'an absolute necessity': it was something which had helped him 'improve myself' and was well worth investing money in.

7.12 However, most learners were seen as being reluctant to pay or to use their ILA funds in this way, for a number of reasons:

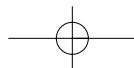
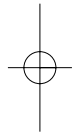
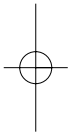
- They were 'decided' learners: 'I don't think there has been much by way of guidance. Whether guidance is necessary I am not sure, because these are motivated people' (TEC Training Director).
- Their incomes were low.
- They were reluctant to erode the limited resources they had available for funding learning.
- They were reluctant to pay for guidance when its benefits were not clear.

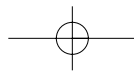
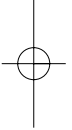
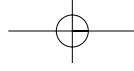
7.13 In Dorset, where in-depth guidance was initially mandatory for all account holders, remarkably little resistance was expressed towards using some of the ILA money to pay for guidance. This may be due to the way in which guidance was marketed here: Dorset Careers carefully crafted leaflets which explained its purpose and benefits.

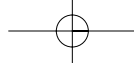
Key messages

7.14 There is a widespread view that free access to information and advice is insufficient, and that some funding to support access to in-depth guidance is required, especially to engage and support non-traditional learners on low incomes or those seeking entry to the labour market.

7.15 Some learners are very willing to pay for in-depth guidance from their ILAs, but some are not.







8 Conclusions and Recommendations

Introduction

- 8.1** The emerging message is that guidance can play a significant role in establishing a lifelong learning culture and engaging non-traditional learners. Achieving this requires the effective marketing of guidance, the specification of success criteria, and creative approaches to guidance delivery. The funding of in-depth guidance needs urgent attention in relation to future policy on ILAs.

Marketing guidance

- 8.2** Guidance needs to be marketed more effectively to stimulate appropriate demand at all stages in the learning process. ‘Good marketing creates and satisfies demand. It also offers guidance. The customer is king, but all kings need counsellors’ (Ball, 1996). Effective marketing may demand a number of steps:

- Clarify the concept of guidance and achieve agreement amongst those involved in guidance delivery.
- Provide a clear exposition of how guidance can benefit different groups.
- Explore how potential clients currently perceive guidance, with reference to existing research (e.g. Wilson & Jackson, 1998) supplemented by locally-based action research.
- Develop a language which can appropriately convey the concept and benefits of guidance to different client groups. Careers staff suggested replacing the terms ‘careers’ and ‘guidance’ with informal ‘discussion’, ‘chat’ or ‘talk’ about learning choices. The focus needs to be on help with self-development, learning new skills and improving prospects. This may mean developing a different discourse for work with non-traditional learners.
- Identify the most appropriate means by which guidance can be effectively promoted to target groups. The current research suggests that face-to-face, targeted marketing through front-line intermediaries is likely to be particularly effective.

Success criteria

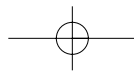
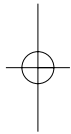
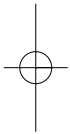
Impartial guidance

- 8.3** In accordance with other reports (e.g. Careerdecisions, 1999; North West TUC, undated), careers staff, trade-union representatives and TEC staff in our study raised serious concerns about the independence of advice offered by learning providers and employers who have their own strategic agendas. This echoes the comments of Tomley (1999), reporting on the Lincolnshire ILA pilot:

“...dangers of the firm controlling rather than supporting the learning and the possibility that employers will take over or usurp the purposes of the ILA, pushing the person in the direction that they want them to go, rather than allowing the individual to use the ILA as they wished.”

- 8.4** Instances were detected in our fieldwork which indicated the favouring of organisational over individual interests. This contradicts the Government’s explicit statement that ILAs were to be based on the principle that ‘individuals are best placed to choose how and what they want to learn’ (DfEE, 1998b).

- 8.5** Tremlett & Park (1995) found that by far the most common source of information or advice on learning was the respondent’s employer: half of learning episodes were preceded by information from this source. But many indicated that they would prefer – and would recommend others to use – other sources such as FE colleges, JobCentres/Job Clubs, careers advisers and public libraries.



8.6 Guidance provided by employers and learning providers is likely to be partial or at best ‘reactively impartial’ (passive and minimalist). This contrasts with the ‘proactively impartial’ approach in which positive efforts are made to provide information, advice and guidance concerning the full range of learning opportunities (Watts & Young, 1997).

8.7 It is important to acknowledge that learners seek and benefit from using a multiple range of sources, formal and informal, which have different roles to play at different stages. But these should include proactively impartial sources. And where guidance is not proactively impartial, the basis on which it is given should be made transparent to learners.

High-quality guidance

8.8 Assuring the quality of guidance is critical. Tremlett, Park & Dundon-Smith (1995) found that simply providing either information or ‘specialist advice and guidance’ prior to learning episodes had no apparent effect on the outcomes measured in their study, but that guidance which was perceived by its recipients to be of high quality was associated with beneficial, satisfactory or motivational outcomes. Positive experiences of guidance have a ‘snowball’ effect, encouraging others from a ‘shared world’ to access guidance; negative experiences (e.g. Learner Profiles 6, 7 and 8 in Appendix 5) may have the opposite effect.

Timely guidance

8.9 For some learners, especially those who are new to learning, in-depth guidance towards the end of a learning episode may be more valuable than it is prior to this episode. Whilst the first episode acts as a ‘taster’ for learning, as learners become more committed they may also wish to become more focused. This point is made with a caveat: although the subject which a non-traditional learner chooses as a first learning episode may not matter, it is important that the quality of learning experience is positive. As Payne (1996) observed, adults who have *successfully* participated in adult education are those most likely to seek further learning. Good pre-entry guidance may help to promote the likelihood of the learner having a positive experience of this first episode.

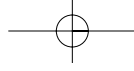
8.10 Careers service companies can have a role to play here in helping learners to clarify their long-term goals related to learning choices, especially in the light of the concerns about impartiality noted above and the tendency for college providers to give priority to course-specific guidance on entry to learning (Tremlett, Thomas & Taylor, 1995). It is important that this in-depth help be available to individuals at times when they are ready for it.

Creative approaches

Outreach

8.11 Accessibility or perceived accessibility of guidance is crucial to take-up: hence the tendency for some learners to look to employers or learning providers for guidance. Guidance workers need to improve their accessibility by adopting an outreach approach.

8.12 Outreach involves establishing networks with others who work directly with, and have the trust of, non-traditional learners. Front-line intermediaries with relevant guidance training (perhaps to NVQ level 2 or 3) can be effective as ‘barefoot’ guidance workers, providing learners with information and advice, and diagnosing those who need in-depth guidance. They can also help identify learning needs and, in some situations, can broker learning provision. Who is appropriate to adopt the role of front-line intermediary depends more on personal qualities than on formal role. Qualified guidance workers have an important role to play in helping to train and support front-line intermediaries.



Partnerships

8.13 Those involved in promoting the role of guidance in relation to ILAs need to secure the involvement and commitment of all the stakeholders – employers, trade unions, TECs (in the future, Learning and Skills Councils) and learning providers. Staff-intensive groundwork is needed to build trust, explain concepts and secure involvement and support. It is particularly important that all stakeholders understand one another's goals and have a common understanding of guidance if effort is not to be diluted. IAGA partnerships are an important vehicle for developing such collaboration.

8.14 It is important to identify and work with enthusiastic advocates or 'learning champions' who are 'evangelists' for lifelong learning and can sell the idea to senior managers as well as to employees. These may or may not be the same people who fulfil the front-line 'intermediary' role described above. A learning champion may be in an officially-relevant post such as personnel or training, but may equally well have another role in the organisation. Importantly, such a person must be interested in, and committed to, learning, and be able both to influence managers to provide practical help with learning and to influence employees to participate in learning.

Brokerage

8.15 Guidance workers can play a part in brokering flexible learning opportunities such as 'roll-on roll-off' programmes which are more practical than courses with regular times for workers on, for example, 12-hour continental shifts. Similarly, on-site tuition is preferred by some learners, and learning providers may be able to run tailor-made courses if a sufficient number of learners is interested.

8.16 The findings of this project mirror Sargent's (1996) observation about the importance of time and place as barriers to learning. Non-traditional learners are not always willing to start their learning in a college environment, although as their confidence grows they may be prepared to take this step. Indeed, several learners said that they would not have taken up learning without on-site provision. Such provision feels 'safe' as well as convenient for some employees.

Developmental process

8.17 For some potential learners, several brief interventions from different guidance sources, interspersed with time for reflection, may be more helpful than a one-hour in-depth guidance interview. This point acknowledges the developmental process of guidance and demands long-term goals to evaluate different strategies of guidance delivery.

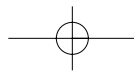
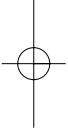
Funding in-depth guidance

8.18 There is a general consensus that the lack of funding for in-depth guidance and outreach-type projects poses a threat to the success of ILAs in terms of their potential to access and engage non-traditional learners. Policy decisions in respect of this require urgent revisiting.

8.19 In broad terms, there would seem to be three alternative policy strategies for funding of in-depth guidance:

- To resource it through *public funding* as a free service.
- To offer it as a *fee-paying* service.
- To *embed* access to it in other provision, including learning provision.

Each strategy on its own is problematic: the public-funding option is likely to be regarded as too costly; the fee-paying option as excluding those unable or willing to pay; the embedding option as endangering impartiality.

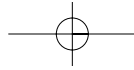


8.20 It seems likely, therefore, that a mixed strategy is required, incorporating elements of all three approaches, and mixing them in such a way that they complement each other's strengths and cover each other's weaknesses. This would make it possible to fund provision which is:

- accessible to all;
- economical in its demands on public funding;
- impartial (or transparent where there are limitations in this respect).

8.21 The evidence from our project supports the proposition that such a strategy should be an important part of the infrastructure supporting ILAs. There is also a strong case for encouraging the use of ILAs themselves as the mechanism for payment. This would:

- enable payments by government and/or individuals and/or employers to be linked, on a co-investment basis;
- enable government to incentivise individuals' payments for guidance, so stimulating the market for in-depth guidance;
- enable government to target its contributions where appropriate towards particular groups, e.g. non-traditional learners;
- encourage in-depth guidance to be viewed as a learning experience in its own right.



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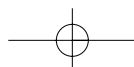
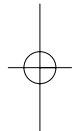
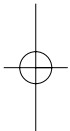
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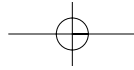
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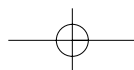
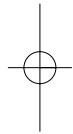
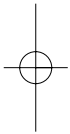
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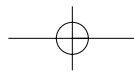
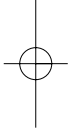
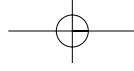
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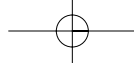
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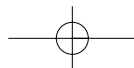
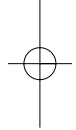
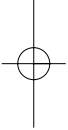
Appendix 1: Peugeot's Assisted Development Programme (ADP)

In 1991, Peugeot launched its Assisted Development Programme (ADP), a joint management/union initiative, managed by a management/union committee which meets once every year. Each division of the company has a sub-committee which works to 'spread the gospel of learning'. The programme is open to all Peugeot employees and is advertised via an ADP brochure and by advertisements on noticeboards and in the company newsletter.

Employees are entitled to apply for up to £250 each year for vocational learning (or £125 each year for non-vocational or 'general interest' learning) to cover tuition and/ or examination fees. Learning activities are undertaken in employees' own time. Vocational learning includes courses such as sports coaching, car driving, motorcycle tuition, public speaking, burglar-alarm installation, painting and decorating, philosophy and politics, as well as more traditional subjects such as computer courses and languages. Training is available from basic and key skills up to degree-level qualifications. Non-vocational learning includes such courses as aromatherapy, bird watching, musical instrument tuition, gardening and sports. Depending on the course being followed, employees have the option to undertake learning on-site, at local colleges and/or via distance learning.

Since its launch, Peugeot have employed a part-time fully qualified guidance worker seconded from the local careers service. A full range of guidance services is available to employees on demand, including information and advice, CV writing, computer-aided guidance and in-depth guidance interviews as well as psychometric testing and diagnostic services. The ADP administrator and the Key Skills Co-ordinator also provide confidential information and advice. The Key Skills Co-ordinator (who also tutors on on-site courses) has been particularly successful in engaging non traditional learners in the ADP scheme. In 4 years, she has taught 238 employees, many of whom are dyslexic and/or lack basic skills in literacy and numeracy. Of these, 40 have subsequently gone on to enrol on a college course. The Key Skills Co-ordinator believes that many people can hide in a manufacturing environment and avoid having to deal with their difficulties. Her role is to identify people on the shop floor with difficulties, and slowly and painstakingly works to win their trust and build their confidence, coaxing them into a learning environment. Peugeot is expanding this model through a government/union-funded project to train people within the company in the kind of 'identifying' and 'counselling' role that the Key Skills Co-ordinator plays.

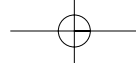
It is estimated that some 25% of Peugeot employees are currently engaged in the ADP programme. Since its launch, thousands have benefited.



Appendix 2: Graphical, Paper and Media Union (GPMU) Project

The growing use of ICT has posed particular problems within the printing industry, which is dominated by SMEs employing between 5 and 10 workers. Such employers find it difficult if not impossible to spare time and money to retrain employees, yet without this investment such SMEs face closure and their employees redundancy. In Dorset, the GPMU recognised this problem and, in a joint initiative between the union, its members, employers, Dorset TEC, Dorset Careers, and Bournemouth Institute of Art, ILAs were used to help avert a looming crisis. Financial contributions to the ILA were made up of £25 from the employee, £25 from GPMU, £100 from the employer and £150 from Dorset TEC. Employees also devoted their own time to retraining. A tailor-made 6-day course in industry-specific software training (QuarkXpress) was developed by and delivered at the local college over three weekends. Dorset Careers staff delivered a group advice and guidance session on the first weekend, and individual interviews were made available on subsequent weekends. Reactions to the guidance session were reportedly, initially at least, mixed. The guidance worker explained that these learners were suspicious of guidance, and unsure whether they needed it. Asked for feedback in groups, a handful described it as 'a necessary evil'. Feedback on an individual basis was however positive. Even the most sceptical were in the final analysis 'won over'. Even those who had expressed initial reservations said at the end that guidance had been helpful and given them ideas that they had not contemplated before. Many have since visited local careers service branches. A number have gone on to do further software training courses in 'Photoshop', another industry-specific package and web authoring.

The project was described as a 'win-win situation' and a 'model project' by all involved. Since its launch of the project GPMU has organised some 1,000 training days in 18 months, and is hoping for more financial backing from the Union Learning Fund so that it can extend the offer to workers in other districts.



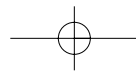
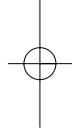
Appendix 3: Delta Printing

Delta Printing, a manufacturing company which builds screen printing machines, has been established for 30 years and has grown rapidly from 160 employees six years ago to its current total of 600. When the Production Manager joined the company 12 years ago, the highest qualification amongst shop-floor workers was NVQ Level 2. The Production Manager has adopted the mantle of 'learning champion', and estimates that some 80% of Delta employees are 'non-traditional learners'.

Soon after joining, the Production Manager identified that each part of the product-build process, representing some 200 different tasks, could be seen to represent a training event. He developed a 'skills roster' and training programme based on this, and used this new system as a way to ensure that his staff reached NVQ Level 3. Competence assessments on the various aspects of the build procedures were used as evidence for NVQ assessment. This led to all shop-floor staff gaining NVQ 3 qualifications.

Subsequently, office staff began to express interest in pursuing qualifications. Company budgets were limited and senior managers would not have been prepared to fund training for this group. The senior managers were persuaded to invest in company training as a result of the Production Manager acting as a broker between them, office staff and the TEC. ILAs, he believes, were the catalyst for change. 16 office staff secured ILAs, made up of a £60 individual contribution, £150 from the TEC and £400 from Delta Printing. These were used for NVQ Level 3 courses in Business Administration and Customer Support.

The Production Manager believes that the impact of ILAs, aside from facilitating learning for the long-neglected office staff, has been triggering a change in the mind-set of senior managers. In the past he has had to work very hard 'against the tide' to get anything to happen. Now training is on the company agenda. It could be argued that this change is much more to do with the Production Manager's tireless work than ILAs *per se*, but ILAs have nevertheless played their part.



Appendix 4: Careers Service Company and TUC Partnership Model

A number of key features are considered by Careerdecisions staff to have been critical to the success of their work in establishing a lifelong learning culture and engaging non-traditional learners:

1. An active partnership between the TUC and Careerdecisions provided the opportunity to promote guidance vigorously and to broker guidance services.
2. Impartial guidance is available. Both careers staff (Careerdecisions, 1999) and trade-union representatives (North West TUC, 2000) emphasise this point. Learning providers have an interest in promoting their own courses, which may not meet individual needs. Employers may encourage learners to pursue job-specific rather than work-related learning.
3. Time is invested in brokering flexible learning opportunities with providers and employers, particularly for non-traditional learners.
4. ILAs and guidance are marketed using language appropriate to the client group, and jargon is avoided. Careers staff suggest replacing the terms 'careers' and 'guidance' with informal 'discussion', 'chat' or 'talk' about learning choices when promoting guidance to employees.
5. Guidance is available on-site. Take-up of careers interviews is significantly higher where on-site access and release to attend interviews have been negotiated. Securing on-site guidance and learning may demand extensive negotiation with employers.



Appendix 5: Learner Profiles

Learner Profile 1

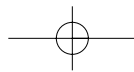
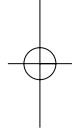
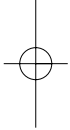
Paul is 47 years old and has worked for a major car manufacturing company on the shop floor worker for 11 years. He has no qualifications and has not engaged in any formal learning activity since leaving school. Paul heard about the ADP scheme through an advert posted on the factory notice board. He feels that school did nothing for him. Paul wanted to *'brush up on his Maths'*. After being persuaded by the on-site Maths tutor to sit some diagnostic tests, Paul decided to take up a Maths and IT key skills course delivered on-site. His job involves using a computer but, he says, little training is offered and there is no help given on the shop floor. His learning activities are therefore helping him in his job, and he says he has found his weekly sessions to be *'very enjoyable'*. The (one-to-one) help his tutor provides has boosted his confidence no end. Paul has recommended ADP to his workmates and several have followed in his footsteps.

Learner Profile 2

Jack is 52 years old and joined a major car manufacturing company when he left school some 36 years ago. He had no qualifications until his involvement in the ADP programme, and had undertaken no formal learning activity since his school days. Four years ago, Jack heard about ADP through an advert in the company newsletter. He decided to *'give it a go'* and selected (without guidance) a French course from the ADP brochure, enrolling on an in-house programme and gaining a GCSE in French. Jack admitted it was a real struggle at first but explains that he had *'a good tutor'* and *'I really enjoyed learning'*. Recently his son has bought a computer and this has stimulated Jack's interest in information technology. This interest, coupled with the encouragement of a colleague, has resulted in Jack embarking on a CLAIT course. He receives support and guidance from the Key Skills Co-ordinator. Jack has recommended the ADP scheme to his workmates but says that *'most are uninterested and cannot see the point, preferring to spend their free time down the pub'*.

Learner Profile 3

John is 48 years old and has worked for a major car manufacturing company for 13 years. His last formal learning experience was in 1972 when he completed a City and Guilds apprenticeship. Recently he bought a computer for his children and, after seeing an advert in the company newsletter, contacted the Key Skills Co-ordinator and enrolled on an in-house CLAIT course. John is enjoying his course very much and says that there is a *'great atmosphere'* at the weekly sessions. He receives ongoing support from the Key Skills Co-ordinator and from fellow learners. He has no plans at present to do any further learning after this course, though he has not ruled this out. John's employer has established a Learning Centre within the organisation and a range of on-site learning programmes are available to all employees.

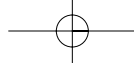


Learner Profile 4

Clive is in his late 30s and works in the maintenance department of a big telecommunications company. He last undertook a formal learning activity eight years ago when he enrolled on a BTEC/ONC engineering course. Clive found this course *'too much'* and had to drop out after six months. He found out about ILAs from his Training Officer who is *'one hell of a person'*. Using his ILA, Clive enrolled on an NVQ course in carpentry/joinery at the local college. He has completed stage 1 in just six months and has enjoyed it tremendously. Now at the start of the ten-week summer break he does not know what to do with himself. Clive's colleague has been with the company since 1961 and is due to retire shortly. He is supporting Clive by passing on relevant skills. Clive believes it has taken him 13 years to find the right course and credits his Training Officer and careers adviser with helping him to do so. Clive opted to have formal guidance at a local careers service and paid £50 for this service; he found this *'very very helpful'*. He welcomed the chance to talk through his current and future plans and was particularly impressed with the suggestion that he put together a portfolio of his achievements and skills. He is now very confident about his future and very positive about his career prospects. Clive regrets not having the opportunity to review his plans and assess career opportunities earlier. He would definitely recommend guidance services to others, especially to *'people who are feeling lost or struggling a bit'*.

Learner Profile 5

Reg is in his mid-40s and started a new job a fortnight ago as a Network Technician. He has a BTEC in Business Studies/Finance and last engaged in learning a year ago when he completed a keyboard skills course. Reg found out about ILAs through friends and thought it would be a good idea to open an account. He has not yet used his ILA but is planning to use it towards studying a Network Administration course. He feels it is very important that his new learning experiences should be closely related to his job. He was pleased to take up the opportunity for in-depth guidance and contributed £25 of his ILA money to the cost. For Reg, guidance gave him a clear idea of where to go, what to do, where to get information from and what to focus on. He says that although he had a rough idea of the direction he wanted to go in, he needed help to understand what he was capable of, what opportunities were available to him and where he could find information about these. He felt *'overwhelmed at times by the choices available'* and also admitted feeling very nervous about the prospect of re-entering education as it was so long since he had undertaken a real learning activity. He found the guidance he received to be *'very helpful'*. At the time of his careers interview, Reg was very unhappy with his job; on reflection, he credits career guidance as helping him to refocus his thinking and supporting him to progress his career ideas. Guidance has given him *'confidence, focus and direction'*. Reg would definitely pay for further guidance in the future if he could afford it, but is concerned that people on low incomes may miss out. He believed that the option of guidance is *'an absolute necessity'*; it is something that has helped him and is therefore *'well worth the investment'*. Reg would definitely recommend guidance to others. In his words, *'if you don't know what to do or which direction to go in, it is a big, big help'*.



Learner Profile 6

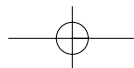
Katie is a 24-year-old graduate currently employed as a Tax Assistant and studying for her exams. A year ago, she contacted a language school with a view to enrolling on a two-week intensive TEFL course. The language school told her about ILAs and she decided to apply to assist her with the cost of the course. She admits she would have enrolled on this course anyway but the additional funds were very welcome. Following completion of the course, she started a summer job teaching English in Italy. Katie opted to have in-depth guidance interview at her local careers service; she contributed £25 towards the cost from her ILA. She feels that the guidance she received was not very helpful, and that although information leaflets she was given were useful, she could have found these herself. Katie said that she had left university not knowing what to do and had hoped that the guidance session would have talked through different career directions and jobs that were suitable for her. She was disappointed that this did not seem to happen. Katie feels the best advice and guidance she received came from a recruitment agency. She had always been interested in accountancy and the agency suggested entering this field via taxation.

Learner Profile 7

Fiona is a 34-year-old training administrator with a BTEC qualification gained in 1998. She heard about ILAs through her work in the training department. She was interested in *'doing a more academic course'* and has applied to study A-level Business Studies. She is waiting to hear whether her application has been successful. Fiona paid £50 from her ILA fund for an in-depth guidance interview. Though she felt the discussion to be *'logical'*, she did not feel that it was of much help to her. The Careers Adviser suggested opportunities and directions such as teaching and environmental health. Fiona says *'although these things were spot on'*, she would have liked the adviser to help her *'narrow these options down'*. She also felt that the requirement of a degree for many of these areas was impractical for her and that she was *'too old to take up a full-time course'*. She says that *'more practical guidance such as talking through the financial assistance available to do a degree would have been more helpful'*. Fiona says that she would not seek guidance again, and would definitely not pay for it. She believes that at her age and stage in life she needs to trust her own judgement and guidance is of limited help. However, she can see that *'it may be helpful for some people'*.

Learner Profile 8

Marion is in her late 30s and has devoted the last ten years to bringing up a family; however, she is planning to return to work in the near future. Marion has a degree and a PGCE and has undertaken a range of learning activities since leaving higher education, including secretarial skills. She found out about ILAs from a friend. She had already planned to undertake some further study and found the ILA an added bonus. She enrolled on a computer skills course which she viewed *'as a useful start to support my return to the labour market'*. Next year, she plans to continue with her studies, e.g. IT skills and a language refresher course. Marion opted to spend £50 of her ILA on an in-depth guidance interview and believes her money was *'poorly spent'*. Although a pre-questionnaire was useful to her, as it helped her to clarify her own goals and plans, she felt she did not gain the inspiration she was looking for from the interview. She told the careers adviser that her *'family was the most important thing'* and she wanted to find a job which would allow her to put her family first. The discussion centred on returning to teaching; however, Marion feels there are other job opportunities that would be more compatible with her lifestyle. She feels that the guidance worker did not help her to fully explore alternative options. Marion says that she would not pay for guidance in the future, although feels that more in-depth assessments, such as psychometric testing and aptitude tests, could be very useful: *'If this was on offer, I would consider paying for this from my ILA'*.



Learner Profile 9

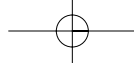
Steve is a 48-year-old factory labourer who left school without any formal qualifications. Last year, he bought a computer and attempted to learn word processing on his own but without much success. He wanted to develop IT skills because he was *'tired of being spoken down to by his children'*. He found out about ILAs from a trade-union noticeboard and decided to register on a CLAIT course. He has now progressed on to an IBT2 course. Both of these are taught via an Internet café which is open within the factory from 11.00am to 8.00pm, Monday to Friday. This is ideal for Steve because he works on three rotating shifts, and has found it difficult to attend a regular college course. He goes to the EDAP centre for a few hours a week, either before or after his shift. He likes the relaxed atmosphere, the lack of pressure, being able to work at his own pace and having help available when needed. The availability of funding encouraged Steve to pursue his interests; however, he reported that *'I would have done the course anyway, if I'd known about it'*. He did not receive any formal guidance, but he felt that he knew what he wanted to do and would have enrolled on the programmes earlier if he had known about the EDAP Centre. Steve plans to continue learning computer skills *'until it gets too difficult or I have achieved what I want to achieve'*. He intends to seek advice on his next step from the EDAP organisers or his local TEC.

Learner Profile 10

Mike is a 55-year-old who left school aged 15 years without qualifications. He is currently working as a full-time contract cleaner for a major employer. Mike previously completed the first year of a full-time degree course in Business Information Systems at a London university, and left mainly because of financial difficulties. As a result of seeing an advert on the factory noticeboard, he learnt about ILAs and the various courses on offer within the on-site learning centre. His friend encouraged him to apply. He was interested in starting a computing course; however, he has been unable to start because of a change to his shift pattern. Mike faces huge practical barriers to accessing learning in terms of *'money, time and energy'* which ILAs themselves cannot fully address. He has not used his ILA but would like to do so in the future. He has not actively sought guidance from formal sources and prefers to rely on his friend's advice.

Learner Profile 11

Christine is a part-time secretary, aged 53 years, who left school without qualifications. She has completed some short IT courses at her local college. She found out about ILAs and other learning opportunities from a friend. She chose to follow a medical secretarial course, which she took to quickly, and described the audio-typing as *'brilliant'*. Her tutor helped to arrange three days' voluntary work experience at a local hospital. This reinforced Christine's view that she would like to pursue a career as a medical secretary. Since her return to learning she has not spoken to a careers adviser, although she now feels that *'this would be very useful'*.



Learner Profile 12

Carole is 38 years old and works part-time as a sales-based order clerk at her local supermarket. She left school without any qualifications. Some time ago, she began a word-processing course, but gave it up after a few weeks because her children were too young, the time was inconvenient, and it *'felt like school with a teacher in front of rows of students'*. More recently, Carole found out about ILAs from a flyer she picked up in the canteen at work. She went along with her friend, and decided to enrol on a computer course (IBT2) because she had *'bought a computer for her children but didn't even know how to turn it on'*. She also wanted to gain promotion in work. Her ILA enabled her to join Ford's Open Learning Centre which was conveniently situated near her home. Carole liked having individual tuition and her tutor was *'brilliant at explaining things'*. She found aspects of the course very difficult and was unable to fit in her study alongside other family commitments. Carole eventually left the course but is still enthusiastic about learning new subjects and developing her study skills. She feels that her new computer skills have enabled her to successfully gain promotion at work. A new computer system is due to be introduced and she now feels more confident. Carole would like to learn more computer skills, Maths, English and other *'school subjects'* to help support her children. Without the ILA funding, Carole said, *'I would have put off doing the course or perhaps would not have enrolled at all'*.

Learner Profile 13

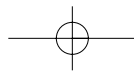
Cathy is 41 years old and has worked for 10 years as a full-time ordering clerk at a local supermarket. She gained some CSEs at school but has not recently undertaken any formal study. She found out about ILAs and the courses on offer at the Ford Open Learning Centre when a representative from EDAP visited the staff restaurant. She was interested in computers because she regularly used one at work and thought she *'would like to give it a go'*. She decided to use her ILA to gain a CLAIT qualification and now hopes to finish CLAIT 2 in the very near future. Since going to the Open Learning Centre she has found that *'my colleagues have started to ask for help with using their computer'*. The ILA enabled her to access new learning opportunities at her local learning centre. This was convenient, flexible in terms of start and finish times, with supportive staff *'who were always happy to help'*, and with *'work planned to suit each student's needs'*. Cathy would not have dreamed of going to a college or university to study; however, as a result of this positive learning experience she now has renewed confidence in learning. At present, she is not interested in further study but is thinking about other career opportunities using her new qualifications. Cathy feels that *'there should be more learning centres with longer opening hours to suit people doing shiftwork'*.

Learner Profile 14

Janice is 51 years old and works as a senior clerk typist for a local council. She has RSA 1 in typing and shorthand which she gained when she was 17 years old. Since then Janice has only completed one-day courses through work. A colleague told Janice about ILAs and she decided to apply for an IT course. She uses Word at work despite having had little training. Her employer has contributed to her ILA. Janice is finding the course unsatisfactory because *'one of the trainers is impatient and discouraging'*. Although she would *'like to complete the course and pass the exam, I am unsure whether I want to go back after having had a few weeks' break'*. Attempts to seek help from the TEC and from her employer to improve the training have not produced any positive results so far.

Learner Profile 15

Lyn is a 38-year-old play-group assistant. She *'appreciated the ILA funding'* which, along with her employer's contribution, enabled her to work towards an NVQ 3 in child care. With this qualification she hopes to earn more and to undertake more responsibility at work. Lyn found out about ILAs from her college tutor and through the college careers advisory service: *'They explained the ILA procedures and provided further details in terms of benefits and eligibility'*. She does not plan to undertake further learning after completing her NVQ 3 as she wishes to spend more time with her children. However, if she needed further guidance about her next step, she would go to her tutor and possibly her employer.



Learner Profile 16

Rachel is 42 years old, and a Director of a three-person company. She has O-levels and a City and Guilds qualification in catering, and in the past has completed a number of short courses. She found out about ILAs when registering her dyslexic son for a typing course at a private training college. Rachel decided to join a typing course because, despite doing lots of clerical work, she does not have any typing skills. She chose a private training provider because they are *'the specialists'*. She did not consider any other typing courses offered elsewhere. Rachel *'would not be averse to further learning'* and would be interested in *'learning more about the Internet and about e-mail'*. She does not know how to find out about courses, but she thought she would ask staff at the college where she is studying, and at the Citizens' Advice Bureau. She would also use the Yellow Pages.

Learner Profile 17

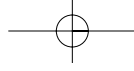
Jill is a 32-year-old learning adviser with O-levels and an NVQ 3 in guidance. She used her ILA to study diploma courses in anatomy, physiology and massage because of her long-term interest in alternative medicine. These courses *'inspired'* her because they were not job-related and she is planning to continue her studies. Jill was able to research the range of courses on offer and had spoken informally to other students, including someone who had followed the course that interested her most. She has recently discussed her next step with her tutor. Jill feels that she has an adequate network of contacts who can provide information, advice and guidance on a range of options available to her.

Learner Profile 18

Anna is employed as a director of a disability organisation, and describes herself as *'an older learner'*. She has a Teaching Certificate and completed her last significant learning activity – a City and Guilds course in fashion – in the late 1970s/1980s. Since then she has attended many short work-related courses. Anna found out about ILAs through a mailing to her organisation from her local TEC. She used the ILA to fund a Powerpoint training course which she found out about directly from the providers. Anna thinks she probably would not have done the course had it not been for the ILA. She does not have any plans to attend further courses but may teach herself another computer package. She feels that *'ILAs make people responsible for their own work-related learning'*.

Learner Profile 19

Sandy, a personal secretary in her late 40s who had nursed her mother through a terminal illness and looked after relatives' children, has a strong interest in community care work. After exploring the options thoroughly with a careers adviser, she decided to train as a care assistant with a view to working with special-needs children.



Learner Profile 20

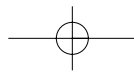
Fred, a 37-year-old man, has worked as a forklift truck driver for approximately twelve years. He left school with some CSEs and completed an apprenticeship in Quality Inspection. He was a talented footballer and was on track for a professional football career; however, he sustained injuries and had to rethink his career plans. He maintains a keen interest in football, managing a *'semi-professional'* team. He found out about the ADP scheme from an advert on the work noticeboard and made further enquiries through his supervisor. He was *'very keen to learn'* and viewed ADP *'as an opportunity to improve his future prospects'*. He believes *'it is never too late to learn and the on-site facilities fit with my domestic commitments'*. He enrolled on a CLAIT and a French beginners course. He is finding both courses *'extremely enjoyable'* and although challenging he feels this is well within his capabilities. His French lessons are very useful because he works with a number of French colleagues and now finds he can converse with them.

Fred recently received an ADP booklet with contact details of the careers adviser who works with the company on a regular basis. The careers adviser has provided ongoing guidance and support and Fred has found this extremely helpful. He knows that *'she is on the other end of the telephone if I need further information, advice and guidance'*. The careers adviser has recently helped him apply for an internal administration vacancy, by helping him prepare his CV, and generally boosting his confidence.

Fred explained that *'colleagues in the French group, my wife, and my IT tutor all provide invaluable support and advice'*. He has been talking to the careers adviser about the possibility of studying sports psychology. He attended a 'Learning Experience' weekend course which he says was *'great and it inspired and motivated me.'* He has, by his own admission, got *'the learning bug'*. He was unaware of the availability of ILAs; however, his employer currently offers and pays for his learning.

Learner Profile 21

June is in her mid-30s and has worked in a car manufacturing company for 13 years. Throughout this time she has been *'very unhappy'* and has always felt that she is *'capable of a lot more'*. She left school at 16 with a few O-levels including Biology. Four years ago, she got involved in the ADP scheme having seen an advert in the company newsletter. She made enquiries about IT courses, discussed her ideas with the Key Skills Co-ordinator and then enrolled on a computing course. The Key Skills Co-ordinator helped to boost her confidence. June felt that overall *'the Key Skills Co-ordinator, the Maths tutor and the careers adviser were inspirational'*. She recently gained Maths GCSE and then enrolled on a part-time Access course at a local college. Next year, she intends to enrol on a full-time degree course to study Occupational Therapy. June has been very proactive in seeking guidance from the careers adviser working within the company. She says she did not know what Occupational Therapy was until she completed a computer-aided guidance programme which recommended this as a suitable choice. She has researched information, and gained some work experience by shadowing an Occupational Therapist. June says she believed *'only certain people could go to university... not people like me'*. She says many people she works with are capable of much more but *'will opt for the safe circle because venturing out of this is, for many, too frightening a prospect'*. June says *'many of my colleagues do not believe they can do anything else and that with time this becomes a self-fulfilling prophecy'*. June, on the other hand, *'loves learning'* and is now very excited about her future. She is unaware of the availability of ILAs.



Learner Profile 22

John is a 27-year-old street mason/road worker aged 27 years who had not studied since passing GCSEs at school. When he was approached at work about ILAs, he chose to do an IT course in order to get some qualifications which might help him with future employment. Having completed CLAIT, he went on to obtain a European Community Driving Licence (ECDL). He has recently applied for an IT foundation course with the Open University. He has bought his own computer and will fund the OU course himself, supplemented by ILA money if possible.

John said he would *'not have got involved in learning if the learning centre if it had not been on the doorstep'*. This enabled him to start the course straight from work. He feels that *'the on-site learning centre was more important to him than the money'*.

John's sources of information and advice about the learning opportunities were a co-worker/TU convenor, the Training Officer and the IT tutor.

Learner Profile 23

Andy is a 48-year-old driver and trade-union convenor who left school without any qualifications and has not studied since he was 17 years old. He found out about ILAs from his employer's Training Officer and the BFS representative who was *'absolutely brilliant'*.

Andy helped to set up the on-site learning centre and worked with training staff, TUC BFS, trade-union stewards and convenors to set up and promote ILAs within the organisation. He decided to open an account because of his interest in IT and because he thought that computer-based skills and qualifications would help him with redeployment if he was made redundant.

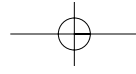
After CLAIT, Andy obtained a European Computer Driving Licence (ECDL). He is taking a GCSE exam in IT and has applied for a foundation course with the Open University. His commitment is apparent through his willingness to fund this course himself, although he is hoping for some financial help through his ILA. Andy would not have got involved in learning if the on-site learning centre had not been available: *'I wouldn't have forced myself out of the seat'*. The learning centre is *'there in front of you...it's in your face...it's perfect...ideal'*. The Training Officer helped Andy by suggesting CLAIT as the most appropriate starting-point and by telling him about the course content. The Transport and General Workers Union representative told him about the GCSE course. Andy saw an advert about the Open University in the newspaper and then sought his IT tutor's advice on the most appropriate course to take: *'She really was very helpful in every aspect...very good.'* He will probably go to the IT tutor or the Training Officer if he needs further advice. Learning took away his fear of using computers: *'it opened my eyes'* and *'broke down the barrier'*. He previously thought he was too old to learn; now he thinks that *'you are never too old to learn'*. He would encourage others to get involved and to take this *'golden opportunity'*.

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Josh, a male shop-floor worker who had been employed as a wire coiler for 25 years, discussed his interest in his children's homework and his long-standing enthusiasm for maths with a careers adviser. By the end of the interview he was considering taking an Accounting Technician Association course.

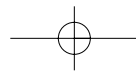
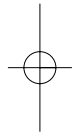
Learner Profile 25

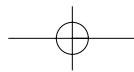
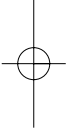
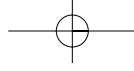
A driver in his mid-20s who had recently completed a BTEC in Business and Finance (with distinction) was looking at the possibility of doing a part-time degree in Law. The careers adviser helped him to arrange an interview with personnel staff in his company to discuss redeployment to the Legal Department.

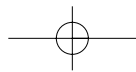
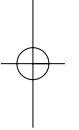
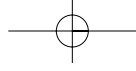


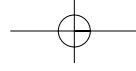
Glossary

ADP	Assisted Development Programme
APEL	Accreditation of Prior Experiential Learning
BfS	Bargaining for Skills
CLAIT	Computer Literacy and Information Technology
EDAP	Employee Development Assistance Programme
ESF	European Social Fund
FEFC	Further Education Funding Council
GPMU	Graphical, Print and Media Union
HRD	Human Resource Development
IAGA	Information, Advice and Guidance for Adults
IBT2	Integrated Business Technology – Level 2
ICT	Information and Communication Technologies
ILAs	Individual Learning Accounts
IT	Information Technology
NICEC	National Institute for Careers Education and Counselling
PGCE	Postgraduate Certificate in Education
SMEs	Small and Medium-Sized Enterprises
TECs	Training and Enterprise Councils
TEFL	Teaching English as a Foreign Language
TSC	Training Standards Council
TU	Trade Union
UDACE	Unit for the Development of Adult Continuing Education









BC

