Review of the **matrix** Standard

2023

Carried out by the Growth Company on behalf of the Department For Education





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Review of the **matrix** Standard

Final Report

28 November 2022

# Foreword

**By the Chair of the Review**

The world has changed fundamentally in recent years. We have seen the impact of COVID-19 on job security, the emergence of a digital and knowledge economy, globalisation and climate change. Millions of people work in jobs today which did not exist when their parent’s left education and first went into work. There are also growing concerns about income polarisation, poverty, health and wellbeing. We have all witnessed dramatic shifts in how people live their lives and creating a livelihood.

In this new world, marked as it is by instability and opportunity, the value of trustworthy information advice and guidance (IAG) is greater than ever. It falls to public, private and third sector organisations to act as ‘safety nets’ in local and online communities guiding those facing challenges and important decisions that lie ahead. The **matrix** Standard (launched in 2002) is the intellectual property of the Department for Education, performs a key role in assuring the quality of IAG provision, backed up with trained and qualified practitioners working in differing offline or online settings. It has been timely to take stock of the existing **matrix** Standard and to future proof it. We are pleased to have modernised and updated the **matrix** Standard, ensuring that it remains world class and fully aligned with the Gatsby Benchmarks for Good Careers Guidance and the Ofsted Education Inspection Framework.

Widespread consultations with national, regional and local stakeholders have taken place, and new ideas generated on best practice that exists in many differing settings. We have learned more about the importance of ensuring high quality IAG is in place for all, particularly those most vulnerable, to support people to thrive and be resilient in the challenges they face - not to be overwhelmed by them or feel abandoned. There is no more compelling motive for humankind than the instinct to provide for and protect people’s lives and livelihoods. To inform them, educate them, and give them hope that they will be able to make good decisions is critical. The revised **matrix** Standard contributes to these goals.

I would like to thank the Department for its continued commitment to supporting the **matrix** quality Standard and to The Growth Company, who managed the formal review and act as guardian of the matrix Standard. Most importantly, we are all extremely grateful to the Executive Group, Advisory Group and many individuals and organisations who came on the **matrix** Standard review journey with us. With your commitment to the values that underpin the matrix Standard and all your efforts in delivering IAG services during a time of unprecedented change, you have demonstrated we all need to work closely to rise to the challenges ahead.

**Dr Deirdre Hughes OBE**

**Chair**

**Review of the matrix Standard**

# Executive Summary

The **matrix** Standard (the Standard) is the Department for Education’s (DfE) Standard for information, advice and guidance services. The Standard assures high quality service delivery in over 1,500 organisations many of which hold Government Contracts to deliver services such as the National Careers Service, Further Education and Adult Education. The Growth Company (GC) has been responsible for the management of theStandard since early 2020. This responsibility included the remit to complete a Review of the Standard. The Standard was last reviewed in 2009-10 and the revised Standard was launched in 2011 and since then there have been changes in society, employment, welfare, education and training which need to be incorporated and acknowledged.

This report highlights the background to the Review which took place between November 20 and October 2022, which was driven by a desire from all stakeholders including DfE to ensure that the Standard remains world-class in ensuring that people receive high quality information, advice and guidance (IAG). It describes the aims and objectives, the processes used during the Review and the arrangements for governance, as well as the outcomes of the Review.

The Standard ensures organisations resources are used effectively to support people to make appropriate choices concerning their career, skills, and future development and to encourage providers of IAG to benchmark themselves, and that an organisation continually looks to improve how they deliver their services. The current Standard is comprised of four elements:

1. Leadership and Management
2. Resources
3. Service Delivery
4. Continuous Quality Improvement.

Each element contains assessment criteria, all of which must be met to achieve accreditation. The Standard along with guidance illustrates how the criteria can be applied in a range of settings. The Standard is flexible. It recognises that while some organisations focus exclusively on IAG provision, others offer IAG as an integral feature of other services such as education.

The assessment process works by collecting primary evidence from people who are involved in IAG delivery, partner organisations and recipients of the service. The assessor’s role is to judge the effectiveness of processes used to support IAG delivery, including the impact of it upon recipients.

As part of the Review process, existing best practice was identified and transferred from the current version of the Standard into a new updated structure which better reflects the ‘plan, do, review’ approach recognised by other frameworks.

The structure of the revised version of the Standard covers the following seven elements which incorporated leadership and management throughout:

1. Purpose
2. Resources
3. Offer
4. Delivery
5. Outcomes
6. Impact
7. Continuous Improvement

**Key changes** in the revised version are:

* The Standard has been aligned with other frameworks such as the Gatsby Benchmarks and Ofsted Education Inspection Framework.
* Duplication, repetition and overlaps have been removed.
* Linkages between the elements and the assessment criteria have been clarified.
* Leadership, which was an element, is now embedded throughout the Standard.
* Since the Standard was last reviewed there has been a greater recognition given to safeguarding, wellbeing and inclusion due to the impact these can have on individuals’ economic recovery following Covid 19 and plans for long term growth of the economy.
* The number of assessment criteria in the Standard has increased slightly from 27 to 31.
* Additional guidance to support interpretation in different organisations and settings has been developed.
* The revised standard now acknowledges the distance recipients of the service have travelled and softer outcomes (e.g. confidence) have been given greater prominence.

## Benefits of the revised Standard

Extensive piloting enabled desired benefits of the changes resulting from the Review to be tested. This piloting confirmed benefits such as:

* **Better Structure** - The Standard has more logical flow with a plan, do, review structure, making navigation and explanation of the Standard easier.
* **Removal of Duplication** – similar criteria have been consolidated and related themes have been placed together making the Standard easier to work with.
* **Clear Expectations** - The recipients of the service must now have access to a clearly defined description of the service they should expect, thereby empowering them to make better choices and question delivery if it does not meet expectations.
* **Wellbeing** - The recipient’s wellbeing is considered, leading to the information, advice and guidance being more effectively received.
* **Hard and Soft Outcomes** – As appropriate, the recipient should be working towards both hard outcomes such as gaining employment or going into training as well as soft outcomes such as gaining the confidence to have a job interview.
* **Distance Travelled** - This added to the revised framework means recipient progress can be reviewed against milestones and support offered to help them achieve their goals.
* **Connecting Frameworks –** strengthening the relationship between the Standard and the Gatsby Benchmarks and Ofsted Common Inspection framework helps link different areas of DfE policy.
* **Solid Evidence-Based Practice** - Requires organisations to gather a sound evidence base to demonstrate that the approaches being applied are based on good practice.
* **Leverages the adoption of technology** to support how assessments are conducted, making it easier to schedule assessment interviews and connect with a range of different sites.
* **Adapts the Continuous Improvement Check** process to better support not only a reflective discussion but a forward looking one.

All the benefits highlighted above support organisations to deliver high quality information and advice and guidance enabling recipients of their service to maximise their potential**.**

**The Growth Company recommend that the revised version of the Standard is adopted by the Department for Education.**

# Background

The current version of the Standard was launched in 2011 and is the third version of the Standard since 2002, when the Standard was first launched. The Department for Education (DfE) wanted to ensure that the Standard remained at the leading edge when it came to ensuring that people receive high quality information, advice, and guidance.

As part of the Growth Company’s contract in 2019-20 a key deliverable was to review and revise, as appropriate, the Standard to ensure it remains at the forefront of best practice within the sectors it supports and demonstrating alignment with other frameworks including the Gatsby Benchmarks for Good Careers Guidance and Ofsted Education Inspection Framework.

# Aim

The aim of this Review was to update the Standard and associated assessment process, so that it reflects best practice around the provision of IAG. This will ensure a Standard and accreditation process which is modern, complementary to and consistent with national IAG policy, engaging and driving continuous improvement.

# Objectives

* To update the Standard criteria, evidence requirements and the assessment process to reflect current best practice in IAG and assessment.
* To engage and consult with stakeholders and customers to identify and test improvements and changes to the Standard.
* To align, where possible, with the revised Ofsted Education Inspection Framework 2018/9, and the Gatsby Benchmarks.
* To ensure the Standard appeals to the diverse audience of providers engaged in the provision of IAG.

# Methodology

Over the period from November 2020 to October 2022 a range of approaches and strategies were employed to review the Standard. These were:

* The establishment of an Executive Group to support the decision process and agree changes to the Standard, and an Advisory Group to provide detailed feedback and feed into the development of the revised Standard. Representatives to both groups came from diverse organisations, including local Authorities, Association of Colleges, Careers Companies, National Careers Service Contractors and Career Development Institute.
* Use of online surveys to gather opinion from customers and **matrix** Practitioners.
* A Literature Review to identify the key features of good quality Information, Advice and Guidance (IAG) carried out between January 2021 and September 2021.
* Consultation through one-to-one in-depth interviews across the Advisory Group.
* Consultation with relevant sector bodies.
* Focus Groups with all **matrix** Practitioners.
* Staged development and testing of alpha and beta versions.
* Piloting of the alpha and beta version with a range of organisations between July 2021 to April 2022.
* Final changes made in May 2022.
* Final Report for DfE with recommendation for approval November 2022.

# Governance

## Executive Group

The review was overseen by an Executive Group comprising:

* Dr Deirdre Hughes OBE, CEO, DMH Associates, (Chair)
* Jennifer Wallis Policy Adviser, Department for Education, Careers Unit
* Julia Waterhouse, Senior Manager, National Careers Service
* Carolyn Parry, President, Career Development Institute
* Scott Parkin, CEO, Institute of Employability Professionals
* Kieran Gordon, Executive Director, Careers England
* Kathy Leahy, External Verifier and Independent Assessor
* Chris Jones, Director, Growth Company
* Roger Chapman, Head of Service, Growth Company

The Executive Group supported the decision-making process and had the authority to accept or reject advice from various stakeholders and approve changes to the Standard and the assessment process. The Executive Group was selected by the Growth Company in consultation with DfE, and its composition reflected the needs of the project by including a broad range of interests. Other responsibilities included defining the roles and responsibilities in the Review process, conducting a review of the strengths, weakness, opportunities and threats, and registering and reviewing the risks associated with the project. Reputational, marketing and alignment risks were covered.

## Advisory Group

An Advisory Group of 36 organisations including accredited and non-accredited IAG service providers, professional bodies, research organisations, organisations involved in supporting the quality and inspection of IAG services and **matrix** Practitioners was formed to provide detailed feedback and insight into the use of the Standard in their sectors. Members are listed at [Appendix 1](#_Appendix_1_–Advisory).

The remit of the Advisory Group was:

1. To provide feedback on the strengths, weaknesses, opportunities, and threats to the Standard.
2. To participate in focused online quarterly webinars to discuss key issues and feed into the design and development of the Standard.
3. To contribute evidence on what works best and what needs to change in the coming years.
4. To consider digital developments and how best to future-proof the Standard in an increasingly digital world.
5. To review the assessment process and make recommendations for continuous improvement monitoring.
6. To give constructive criticism and reaction to developmental ideas and suggestions (including alpha and beta versions) from an end-user perspective.

Each member of the Advisory Group met with Roger Chapman who is Head of Service for the Standard at the Growth Company, for a series of one-to-one meetings. Evidence was provided such as the Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis, summarised [below](#_SWOT_Analysis). The members also provided feedback on the current Standard, and on the developmental alpha and beta versions. Often copies of draft versions were returned with comments which were reviewed by a sub-set of the Executive Group. The feedback was reviewed carefully and selectively by the Executive Group as not all suggested changes could be adopted, to ensure the Standard remains appropriate to all sectors.

# SWOT Analysis

To support the review the Growth Company identified the need for a Strengths, Weaknesses, Opportunities and Threats (SWOT) of the current Standard and assessment process to be carried out. This was used to help understand the areas of the Standard which needed updating and to ensure that the current strengths remained or were strengthened and to identify opportunities for the future use of the Standard.

Feedback on the strengths and weakness of the current Standard were sought from the Executive Group and the Advisory Group which included customers, **matrix** Practitioners and other stakeholders, to gather their views on the current **matrix** Standard.

This feedback was gathered via one-one-to-one consultations to record the perceived strengths, weaknesses, opportunities, and threats. Input was also gathered through a survey of 93 organisations and 22 assessors, and regional focus groups with the assessors were run.

The output from these processes were reviewed by members of the Executive Group to create a SWOT analysis of the of the current Standard and assessment process. This content was then grouped into themes, which included feedback about the Standard, the assessment process, the market, alignment with other frameworks and the key findings are highlighted here:

The following strengths of the Standard were found:

* A well-established quality improvement Standard.
* Widely recognised in the core sectors it serves.
* Focused on improving outcomes for service users.
* The assessment processes are effective.
* Professional assessors add value.
* The standard can be used in a wide variety of organisations which deliver IAG for example a sole trader who may deliver careers advice in a school, a website, a charity, a careers company or organisations responsible for delivering the National Careers Service.

The following improvement areas were identified:

* Duplication, repetition and overlaps within the elements needed to be reduced. An example of criteria that overlap with one another are 1.1 and 1.2 in the current Standard. 1.1 requires theservice to have aims and objectives and 1.2 requires clear leadership and direction. The effective leadership of any service requires the setting of clear objectives, therefore, combining the two criteria in new criterion 1.1, has brought together the expectations of how senior leaders demonstrate their commitment.
* Linkages between the elements and the criteria needed to be clearer.
* Greater prominence needed to be given to Safeguarding, Wellbeing and Inclusion which have all risen in prominence since the Standard was last reviewed.
* The Standard needs to provide more guidance to support organisations to interpretate the use of the Standard in in different settings. We already have guides for Further Education and National Careers Services, however there are currently no guides for Higher Education and Adult Education. Providing supporting guides make it easier to understand how the Standard can be applied in different setting and apply good practice. For example, in the National Careers Services the guides include the use of Careers and Skills Action Plans and the Customer Charter.
* The distance travelled (i.e. the improvement over time of the recipient) should be given greater prominence to better review the outcomes achieved. Each person receiving the service is unique, they each have their own starting point and to serve them effectively it is important to review their progress over time to assess the impact of the IAG on hard outcomes such as employment as well as softer outcomes such as confidence.
* The Standard needs to better align to other frameworks such as the Gatsby Benchmarks and Ofsted Education Inspection Framework. The Gatsby Benchmarks were launched after the previous version of the Standard was introduced and the Ofsted framework has been updated to include an effective careers programme and providing impartial careers guidance.
* The assessment process should include digital delivery and the Standard should embrace digital and blended delivery.
* There should be a requirement for the organisation to clearly define the IAG that it provides.
* The interpersonal skills of any adviser supporting clients should be further emphasised, as being able to build rapport with someone is equally as important as technical knowledge. In revised Standard at criterion 2.2 *“managers and staff will describe the interpersonal skills and behaviours required*” which sits alongside the other skills.
* The measurement of both hard and soft outcomes should be clearer in the Standard to encourage the tracking of both over time to better measure the distance travelled to better evaluate the impact of IAG on the recipients’ goals overtime Whilst, the Standard does not mandate how this is done; guides could point to good practice in different sectors and the Ofsted requirements around this in education and careers could be highlighted.

The flexibility to apply the Standard in a range of settings is valued and the group identified the opportunity to develop further sector guides to provide contextualisation and expectations within different settings. The plan, do, review approach was seen as positive along with the focus on continuous quality improvement, although it was also recognised there was some duplication in criteria and it was not always easy to follow the ‘linkages’ across different elements. Some specific areas were highlighted as needing greater prominence such as equality and diversity.

Contractual mandating of the Standard was highlighted in many places throughout the SWOT analysis. It is considered a strength and adherence to the Standard led to better outcomes and consistent delivery for recipients. The risk of withdrawing the requirement to hold the Standard was also recognised by many contributors as a risk that would have a negative impact upon the Standard.

The survey of organisations showed that 78.4% agreed “that the Standard helps to assess and benchmark the quality of our IAG services”. Further comments from organisations provided below show how organisations feel the revised Standard helps to improve the delivery of the service:

A range of comments are provided below to support this:

* *“Having the* ***matrix*** *Standard ensures providers are consistently working to the same high standards”.*
* *“Running on tight margins as we do it ensures that our leadership prioritises the delivery of high quality IAG”.*
* *“A 3-year assessment cycle backed by annual checks ensures we are improving our deliver of IAG”.*
* *“The feedback from our assessor is invaluable with their experience they always provide great insight to improve the service”.*
* “*The revised Standard supported better improvement planning”.*

The feedback gathered throughout the SWOT about the assessment process was broadly positive. Organisations valued the external perspective and professionalism of the **matrix** assessors, providing insights into the strengths and improvement areas for their IAG service.

Some stakeholders such as organisations who deliver the National Careers Service identified that the assessment process could be more rigorous for multi-facetted IAG providers where the National Careers Service is just a part of the service they deliver. Also, assessors had some concerns about the rigour of some large multi-campus FE provision and recommended looking at the sampling.

This feedback, coupled with the literature review, the advisory group, and surveys, was critical in identifying the changes required to the Standard and the assessment process.

# Key Stakeholder Engagement

Engagement was made with the Gatsby Foundation, Ofsted and Quality in Careers to gain insight into areas of priority and how the Standard could support and complement other frameworks.

Sir John Holman (author of 'Good Career Guidance' from the Gatsby Foundation, who was appointed by former Education Minister Gavin Williamson to review the careers landscape) met the Chair of the Review and the Head of Service, Roger Chapman at an early stage in the Review process.

At this meeting, the aims of the review were shared with Sir John including building closer alignment with the Gatsby Benchmarks. Robert Cremona and Beth Jones of the Gatsby Foundation worked closely with our Executive Group to critique the developing Standard and advise on alignment with the Gatsby Benchmarks. Drafts of the Standard were shared and commented upon, and some feedback from the Gatsby Foundation on the Standard which were specific to Further Education (FE), these were incorporated in an FE Guide for FE organisations using the Standard.

The Chair of the Review and the Head of Service met with Helen Flint (a Specialist Adviser for Further Education and Skills at Ofsted, who was supportive of creating a guide to show the alignment with the Ofsted criteria concerning information, advice and guidance). To support this work the Growth Company commissioned Karen Adriaanse (a consultant and former senior manager within Ofsted) to develop the Ofsted Touchpoints Guide, copies of which were shared with Helen Flint for comment and approval. This work led to the development of ‘touchpoints’ with these other frameworks/requirements, which is referred to later under [Guidance Materials](#_Guidance_Materials).

The Quality in Careers Standard, which is supported by the Department for Education, was also consulted, and Paul Chubb (Director of the Quality in Careers Standard) was part of the Advisory Group. Draft copies of the revised Standard and the guides were shared with the Quality in Careers Board. This process ensured that the Standard remained complementary to the Quality in Careers Standard and their feedback was particularly useful in helping to shape the criteria due to their knowledge of the sector and standards.

The Careers and Enterprise Company contributed to the Review, represented by Andrew Webster (Business Partnerships Manager) and Kelly Dillon (National Sector Development Further Education and Inclusion). Again, draft copies of the Standard were shared and commented on with additional feedback on FE to support the development of a guide.

The contributions of West Midlands Combined Authority are acknowledged, in introducing eight Colleges to participate in a consultation and of AGCAS in conducting a SWOT analysis among its membership.

# Literature Review

The purpose of the literature review was to identify the key features of good quality Information, Advice and Guidance (IAG) in order that they could be considered as part of any revisions to the Standard. This extensive piece of work was conducted by The Institute of Employability Professionals between January and September 2021 and reviewed 317 pieces of research, drawing on a wide range of published reports to inform some broad themes.

For the purpose of the literature review the following interpretations were used:

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

No evidence was found in the literature review to suggest that effective techniques in IAG support differ significantly between sectors. There is strong evidence in support of IAG services that increase the recipients’ capacity to self-manage, enhance their intrinsic motivation, and develop their capabilities for choices and action.

The influence of leadership and management on recipient satisfaction and outcomes is included in several European and international quality assurance standards, such as ISO9001, Investors in People and the European Foundation for Quality Management Framework. A key quality element in leadership is the value placed in the use of a quality standard for front-line delivery by those who lead and develop IAG services.

It was recognised that although the Standard is an outcome-based standard, there is no single measure of successful outcomes that applies to the diversity of sectors where the Standard is used. Providing examples of good practice in different sectors supports the development of relevant outcome measures for different domains.

In supporting the achievement of outcomes from different sectors where IAG is delivered, the Review identified common key features:

* Attention to recipients’ individual circumstances throughout the process to achieve better outcomes.
* Increasing the skills of IAG advisers particularly interpersonal skills and the skills to measure the distance recipients have travelled during the IAG support and beyond.
* Seeking feedback and data equally from unsuccessful and successful recipients, to better understand the impact of the IAG and use the data to improve practices to enable future parity of outcomes across different recipient groups.

The increased use of digital technology in IAG delivery was considered; the conclusion being that it needs to be appropriately designed with the end user in mind to ensure it is accessible, cost effective and adds value. If there is a rush to use technology without appropriate research and design this can lead to costly mistakes.

The plan, do, review approach currently used within the Standard was supported through evidence as being at the heart of good service delivery, ensuring that the framework for delivery addresses policy goals, processes, practitioners (those delivering IAG), outcomes (both soft and hard) and the needs of recipients.

The Gatsby Benchmarks are now widely adopted in England’s schools and colleges, feeding into institutional self-improvement plans and the Ofsted Education Inspection Framework.

**The literature review concludes that the Standard is complementary to these other standards and provides additional value in being applicable across many different IAG sectors. It also concludes that its detailed description of IAG quality can usefully be adopted to complement and read across to benchmarks and inspection frameworks within the UK and further afield.**

The Literature Review report can be found here: <https://matrixstandard.com/media/1272/matrix-lit-review-final.pdf>.

# Customer and Practitioner Surveys

Since the last review there have been many changes to the careers landscape, the introduction of the Gatsby Benchmarks, changes in statutory guidance to schools and colleges, further recognition that good careers information advice and guidance is important to economic growth and helping adults and young people make informed decisions about their careers.

During the current review of the Standard, we issued 115 invitations to 93 organisations currently accredited to the Standard and to 22 **matrix** Practitioners to seek their opinions of the current Standard and what and how the Standard needed to be changed since the last review in 2010.

This was to ensure it remained reflect current best practice in IAG bring it up to date and set it with in the with the current careers landscape.

In summary there was broadly positive feedback in relation to the current Standard, 78% agree it helps to assess and provide a benchmark for quality and 95% of organisations asked, agreed that the Standard should be structured around a plan, do, review cycle and assessment approach.

The opportunity to clarify the role the Standard plays in the careers policy environment, 80% agreed that that the Standard should map across to the Ofsted and 75% agreed it should map across to the Gatsby Benchmarks.

The survey results were broadly in line with the SWOT analysis developed from the Advisory Group SWOT analysis feedback (see [above](#_SWOT_Analysis)). The key findings from the surveys were:

* Strong agreement that if IAG is to be successful it must be supported by the leadership team within the organisation.
* Recognition of the need to map the Standard with the Gatsby Benchmarks and Ofsted Education Inspection Framework, but also noting that these frameworks are not relevant for all organisations who seek **matrix** Accreditation.
* Plan, do, review cycle seen as positive.
* Respondents value annual Continuous Improvement Checks (CICs), 75% agreed that they are effective in monitoring the IAG delivery and improvement and whilst continuous improvement is an on-going process, structured discussions between assessors and organisations during the CICs was beneficial. However, there was some acknowledgment that where organisations had established systems in place to ensure continuous improvement and where there has been minimal organisational change, then there can be less scope for CICs to add value. Nevertheless, CICs provided a good opportunity to review progress and monitor the organisation progress.
* Organisations value and gain benefits from using the Standard, 80% see the Standard as an appropriate tool for improving IAG practice and 80% would recommend the Standard to other providers.

# Development of Alpha and Beta Versions

Using the findings from the literature review, advisory group feedback and surveys, an alpha version of the Standard was documented, and further feedback was gained. The alpha version was developed by a subset of members of the Executive Group.

The current Standard is comprised of four elements:

1. Leadership and Management
2. Resources
3. Service Delivery
4. Continuous Quality Improvement

Each element contains assessment criteria, all of which must be met to achieve accreditation. The Standard along with guidance illustrates how the criteria can be applied in a range of settings. The Standard is flexible and can be used in a variety of organisations. It recognises that while some organisations focus exclusively on IAG provision (for example the National Careers Service), others offer IAG as an integral feature of other services such as education and training organisations.

Taking the feedback from both the literature review and from the advisory group, the key feedback was:

* The current Standard reflects good practice and much of it could be transferred into the revised Standard.
* The Standard should be made easier to navigate it terms of its structure and layout.
* It should reflect both digital and hybrid delivery.
* The Standard should be modernised in areas to reflect changes in legislation such as General Data Protection Regulation (GDPR) and societal changes such as an increased focus on wellbeing.
* Leadership should run through the whole Standard rather than be a separate element.
* It should connect better with other areas of policy such as the Ofsted Education Inspection Framework and the Gatsby Benchmarks.

## Changes in the Alpha Version

The four elements of the current Standard above were redesigned into seven elements. These became;

1. Context
2. Resources
3. Offer
4. Delivery
5. Outcomes
6. Impact
7. Continuous Improvement

* The new logical flow of the elements 1 - 7 above reflects a continuous improvement cycle which repeats this is in keeping with other quality frameworks including the Ofsted Education Inspection Framework. This made aligning the touchpoints with Ofsted easier and more straight forward for organisations as it reads across to the Ofsted “3Is” of “Intent, Implementation and Impact”.
* Best practice from the current version of the Standard was transferred into the revised version.
* Three current elements transferred across to the revised Standard, namely resources, service delivery and continuous quality improvement.
* The remaining leadership and management element has been embedded in the whole structure as it is important at every stage.
* From the current Standard eleven of the supporting criteria transferred directly across and eleven criteria were consolidated. For example, the previous criterion 1.1 required the service to have aims and objectives and 1.2 required clear leadership and direction. Having effective leadership is dependent on creating clear objectives, to reduce these overlaps criteria 1.1 and 1.2 were consolidated within the new criterion 1.1 to cover the commitment of senior leaders to high quality IAG. The previous criterion 4.1 requires the organisation to measure and evaluate the service against its stated aims and objectives and 4.2 – 4.7 specify what should be measured and evaluated. The previous criteria have therefore been consolidated into two criteria at 7.1 and 7.2 and brought together what should be measured and evaluated and how this evidence is used to develop the IAG service.
* Seven criteria were divided into twelve new criteria to give greater clarity and reflect best practices, and three new criteria were added (shown in table below).
* Close consideration was given to the relationship with the Gatsby Benchmarks. For example, element 3 the “Offer” includes the need for an “openly available description of the IAG” which supports Gatsby Benchmark 1 and encourages colleges to publish their careers programme.

Examples of some criteria that have changed to support the narrative above:

|  |  |  |
| --- | --- | --- |
| **Example of a Change** | **Current Criteria** | **Revised Criteria** |
| The current 1.4 has been divided into 3 criteria that deal with safeguarding, data security and statutory requirements. This better reflects good practice. | 1.4 The organisation complies with existing and new legislation which might impact upon the service. | 1.3 Staff and recipients feel safe.  1.5 Data security and privacy of recipient data are defined.  1.6 The organisation responds to relevant statutory requirements. |

|  |  |
| --- | --- |
| Examples of new criteria added to the revised Standard | 1.4 A culture of wellbeing exists.  4.2 The individual needs of those receiving the IAG are explored and established.  4.6 Actions are monitored, and further support provided as appropriate. |

Other considerations that were incorporated in the alpha version were:

* **Wellbeing** – the consideration of both recipient and staff wellbeing was added. The pandemic has made everyone acutely aware that the mental health of both staff and recipients is important. If people are anxious, they are less-effective communicators and listeners, therefore, consideration should be given to the wellbeing of those involved in both the delivery and receipt of the IAG service.
* **Distance Travelled** – Recognition of the importance of measuring the progress of recipients over time. It is important as that each person receiving the service is unique, they each have their own starting point and to serve them effectively, it is important to review their progress over time to assess the impact on Information Advice and Guidance on hard outcomes such as employment as well as softer outcomes such as confidence.
* **Safeguarding** - was made more explicit, becoming a discrete criterion rather than a guidance consideration. The current version of the Standard at 1.4 only requires the organisation to comply with legislation and it does not specify what this is. Therefore, the new 1.3 was added to make this explicit.
* **Equity -** this was given greater prominence as a discrete criterion. This included a requirement to achieve parity of outcomes amongst diverse groups and it is included in the [glossary](#_Appendix_7-_Glossary).
* **A Solid Evidence Base** - to support practice was added to the Continuous Improvement area.
* **Flexibility** - to apply theStandard in a range of different sectors and contexts, was maintained ensuring it does not ‘talk’ to only one sector.
* **Clear Values** - of those delivering IAG were added, such as confidentiality and impartiality.
* **Guidance** - Identifying the touchpoints to the Gatsby Benchmarks and Ofsted Education Inspection Framework were developed.
* **Hard and Soft Outcomes** - were acknowledged as a range of possible IAG outcomes.
* **Plain English** - guidance from the Plain English Campaign was used to ensure clear language.

The alpha version was then taken to the wider Executive Group, the Department for Education and the Advisory Group. Following feedback from these groups further changes were made.

* The ‘Context’ element in the alpha version was viewed as unclear by some organisations. It was therefore renamed ‘Purpose’ as this was modern and reflected that organisations need to understand the purpose of the IAG service and how it serves the recipients.
* The structure of the elements in the alpha version had been designed to replicate the plan, do, review process, but two elements (‘Resources’ and ‘Continuous Improvement’) sat outside of that structure on the visuals. This was seen as confusing, so we redesigned the structure to ensure that all elements were seen to be within the plan, do, review structure.
* The ‘Resources’ element was too long, it was the only element in the Alpha version that had to be broken down into sub-sections of which there were five covering competencies, information, partnerships and networks, policy and procedures and premises and equipment. This made it unbalanced compared to other elements, to address this a group of Assessors suggested the solution of redistributing some of the criteria elsewhere in the Standard. For example, the policy and procedures section was repositioned to Element 1 Purpose and both information and partnerships and networks were repositioned under Element 5 – Delivery.
* In maintaining the flexibility and applicability to a range of organisations in different sectors, one of the areas of consideration was the language used in the Standard, to ensure all organisations that seek or consider **matrix** Accreditation recognise it relates to them.
* Some feedback and suggestions received were specific to a particular type of delivery or sector, and therefore the assessment body has committed to develop a range of sector guides to provide contextualisation for different sectors.

During the development process regular meetings took place with the Gatsby Foundation. This influenced the structure of the revised the Standard. Critically, the “Offer” element in revised Standard now more closely supports, *Gatsby Benchmark 1 “A Stable Careers Programme”* whichincludes publishing the details of a school's career programme on the school's website. The revised Standard now requires organisations have an openly available description of the IAG offer they will deliver.

Consultation took place with Ofsted and structure of the revised Standard was influenced by their “3Is” framework. Regular meeting with the Gatsby Foundation and Ofsted provided the platform for closer work on various guidance documents.

These updates gave rise to the beta version, and this was taken to the Executive Group for approval, followed by the Advisory Group for comment. The beta version has also been reviewed against the Plain English Campaign Guidelines.

## Piloting Beta Version

Following feedback from all parties on the alpha version the element known as Context in the alpha version was retitled to Purpose as this was seen as modern and engaging. The Resources and Continuous Improvement elements were re-positioned as part of a single plan, do, review structure. A host of minor changes to language of each criterion were made based on the feedback received to ensure it reflected best practice. This led to the revised elements:

1. Purpose
2. Resources
3. Offer
4. Delivery
5. Outcomes
6. Impact
7. Continuous Improvement

Following approval of the beta version by the Executive Group, organisations and **matrix** Practitioners were identified to undertake pilot assessments and provide detailed feedback at the conclusion of the assessment.

There were seventeen pilot assessments completed, these were all full pilots of either initial assessments or 3-year reviews covering a diverse range of sectors including Apprenticeship Providers, Training Providers, National Careers Service delivery organisations, contractors who deliver DWP Provision, Adult Learning, Charities, and Housing Associations. A full list of pilot organisations is show in [Appendix 2](#_Appendix_2_-).

Comments received following pilot activity included:

“It felt like it was written for us”

“It worked really well”.

“The Standard was easy follow and explain to others”.

“It helped to identify areas for improvement”.

**Education Development Trust (EDT) is an international not-for-profit organisation working to improve education outcomes around the world.**EDT commented:

“Thank you! It has been an amazing process to be a part of. I had already started to consider the role of the Continuous Improvement team within the Employability and Careers directorate, and how we could best support future growth, and an ever-expanding number of Information, Advice and Guidance (IAG) contracts. Being part of the pilot of the new **matrix** Standard criteria was very timely and fitted in well with our own plans.”

**“**I welcomed the new assessment criteria. It is very much aligned to a customer journey with continuous improvement woven throughout and this, in turn, is more reflective of our organisational continuous improvement strategy. Staff who took part in the assessment commented that they felt able to share their success stories and talk about what made them most proud in delivering the service”

A Case Study featuring EDT is available here: <https://matrixstandard.com/media/1235/edt-first-pilot-case-study.pdf>

Another of the pilot organisations, Brook, provides a range of sexual health services and wellbeing support nationwide, both to young people under 25 and, more recently, to those over 25. They commented:

“We really love the new Standard! We did it once under the previous criteria, and really struggled with the focus on the careers sector, with the language, and the structure of the pack. It didn't feel very logical, whereas this time with the new Standard it felt very logical, and it spoke to us as an organisation. It was a lot easier for me to give the Standard to my colleagues, and for them to translate it, especially if they're not doing it as their day-to-day job. It was easy for them to pick up and think, well, I know what that means for me in my role and for my team.”

A Case Study has been produced on their experience, and is available here: <https://matrixstandard.com/media/1292/matrixstandard_casestudy_brook_june22.pdf>

Following the piloting there were two remaining considerations to resolve, the first of which is the generic term used for those receiving the IAG service. In the current version of the Standard the generic term used for those who receive IAG is ‘client’. We found that his term is not universally recognised by organisations, and in some sectors was viewed as confusing because other stakeholders would be referred to as clients or customers. Other terms such as ‘customer’, ‘beneficiary’, ‘service user’, ‘participant’ and ‘recipient’ were explored. There was polarised feedback, on most of these terms, with the most neutral being for the term ‘recipient’. The Executive Group concluded there would be no ideal term for all organisations in all sectors, but the term recipient should be adopted and a clear definition of what is meant by the term be provided.

The final consideration was for the style of writing used in the Standard and associated guidance, which has to date been written in the third person. On reflection it was identified by members of the Advisory Group and Executive Group that a more personal style could be adopted by changing the tense from the third person to the first person in the ‘what this means in practice’ section. Changing a sentence such as *“Senior managers can describe the purpose of the IAG and how it is managed” to “Your senior managers will describe the purpose of your IAG and how it is managed.”* made the document more engaging and straight forward to action for organisations.

# Benefits

## Benefits for Organisations

The Standard is more logical to follow with a plan, do, review structure, making navigation and explanation of the Standard easier.

Duplication has been removed and themes have been placed together making the Standard easier to work with.

It explicitly requires the organisation to define the service that it delivers making the assessment and measurement of delivery easier.

The Standard now explicitly covers a range of new best practice areas which includes:

* Wellbeing
* Safeguarding
* Data protection
* The skills and competence of the IAG staff
* Distance travelled
* Measurement of both hard and soft outcomes.

New guidance links the Standard to the Gatsby Benchmarks and Ofsted Education Inspection Framework provides a cohesive approach for organisations to adopt good practices.

Sector guides showcase what “good” looks like in different settings.

Organisations are required to gather a sound evidence base to demonstrate that the approaches being followed are based on good practice.

The adoption of technology to support how assessments are conducted is providing added benefits making it is easier to schedule appointments and connect with a range of different sites.

The Continuous Improvement process has been adapted to better support not only a reflective discussion but a forward-looking one.

## Benefits for Recipients

The recipients of the service must now have access to a clearly defined description of the service they should expect, thereby empowering them to make better choices and question delivery if it does not meet expectations.

The assessment process makes it easier to connect with recipients of the service using technology thereby increasing their voice in the assessment.

The recipient’s wellbeing is considered, leading to the information, advice and guidance being more effectively received.

Where relevant, the recipient should be working towards both hard outcomes such as gaining employment as well as soft outcomes such as gaining the confidence to have a job interview.

As distance travelled is covered in the revised framework then progress should be reviewed against milestones and support offered to help recipients to achieve their goals.

As equity is important recipients should receive support which is appropriate to their individual needs to enable them to achieve outcomes which are similar to their peers.

## Wider Benefits of the Revised Standard

Strengthening the relationship between the Standard and the Gatsby Benchmarks and Ofsted Common Inspection framework helps link different areas of DfE policy.

Enables better benchmarking of National Careers Services contractors by ensuring that the assessment of this service is given due prominence during the assessment of multi-faceted providers.

Raises standards across all areas of provision and does this consistently where it is mandated.

# Marketing

Launching the revised version of the Standard will be a great opportunity to engage both new and existing customers. An official launch event will bring together those who have worked on the Executive and Advisory Groups, pilot organisations and practitioners. The launch and the surrounding activity will raise the profile of the Standard, celebrating its future, together with the modernised assessment process which will deliver it. A series of targeted marketing campaigns across 2023 will reach out to the new wider audience, mirroring the new sector guides. Therefore, there will be various campaigns including:

* Further Education
* National Careers Service
* Employability
* Money Advice
* Higher Education

We intend to work with DfE to agree messaging for organisations about the benefits of the **matrix** Standard. We will also seek to run sessions internally for DfE as required and for key partners such as National Careers Service Prime Contractors.

Our launch marketing and communications will focus on the benefits of the Standard and point to the areas where we are seeking to raise standards around areas such as wellbeing, inclusion and measuring distance travelled. We will introduce the new aspects of the Standard and publish ‘thought leadership’ pieces around Digital, Wellbeing and Special Educational Needs continuing to work with our Executive and Advisory Steering Group members to ‘story-tell’ these messages. New themed webinars will be held to attract new organisations and to help transition existing accredited organisations to gain the benefits of the new Standard. Again, working in collaboration with our new and existing partners as hosts and guest speakers with affiliate marketing in their network.

Innovative marketing resources have been created such as documents highlighting differences between the current version and the revised version, the Ofsted and Gatsby Touchpoint Guides, sector guides (see appendices). To distribute these resources the Standard website will allow organisations to ‘self-serve’ to access to the guides they need and easily contact us for support. Additionally, a programme of events will be arranged, themed around each of the guides these events will reach out to both new and existing organisations to share good practice and attract a wider audience.

# Assessment Process Changes

The assessment process itself received positive feedback from the Advisory Group and from the Surveys. No major changes were justified as the process is already seen as adding value and focused on improving outcomes.

There are some minor changes to the assessment process:

* Improvements to the annual Continuous Improvement Checks
* Enhancing the sampling for National Careers Service provision
* New Guidance for assessing large multi-campus FE provision
* Embedding the benefits of digital assessments in the process

These are each dealt with in turn:

## Improvements to the annual Continuous Improvement Checks

The Practitioner Survey and the Customer Survey identified that whilst the annual Continuous Improvement Checks were important to protect the integrity of the Standard and ensure organisations continuously improved the delivery of their service, they could also add further value. Following further consultation with Practitioners and the Advisory Group, changes were piloted such as including discussion around the organisation’s future plans and simplifying the documentation used in the CICs. The same form design is used for both annual CICs (rather than the current different layout for each year), and these now consolidate the Assessor’s feedback to avoid duplication and to better connect related themes. 10 pilots were conducted using the new documentation the organisations involved are detailed in [Appendix 2](#_Appendix_2_-). The feedback on the changes has been positive from all parties as it is easier to review progress overtime and the process is more forward looking.

## Enhancing the sampling for National Careers Service provision

There is a risk that where a provider delivers a broad range of services, the focus on the delivery of the National Careers Service contract may be less comprehensive that that of an organisation solely delivering the National Careers Service. Therefore, the sampling and reporting guidelines for the Standard were changed during the piloting to ensure that the same focus was given to the National Careers Service contract, as if it were a standalone service.

This change was tested with the Education Development Trust (which delivers multiple services) whereby the National Careers Service provision was scoped for assessment against the Standard separately and this was added to the time needed to assess the rest of the organisation. This is intended to improve the quality assurance of the National Careers Service, in organisations which deliver a range of other services.

## New guidance for assessing large multi-campus FE provision

There has been a trend towards college mergers over the last decade and there is risk that for such large and complex institutions the current assessment guidelines do not give appropriate guidance on how best to assess and cost the time needed to ensure that a sufficient range of provision is assessed, given the diversity of these multi-campus colleges. Therefore, the following new guidance was developed:

* Where the site/s is managed autonomously e.g., has its own Student Services Manager, the site/s should be assessed and costed separately. Customers may choose to have separate accreditations at each site.
* Where there is significant difference in the type of delivery e.g., apprenticeship, student services and there are specialist staff at each, again there should be individual scoping of each site/service. For all remote assessments, it is expected that staff interviews will be sampled from across geographical locations.
* Where sites have a different delivery (for example Adult College versus General FE) each site should be ‘visited’ (either in person, or evidence gathered remotely from managers, staff and recipients) with appropriate adjustment to the time needed.
* Over two assessments (Initial Assessment and first Review), all sites should be covered (this does not include outreach sites).

## Embedding the benefits of digital assessments in the process.

The development of the revised Standard took place during COVID-19 so there has been much learning to take into account from conducting remote assessments using online technology.

* The use of digital communication and sharing platforms is widespread and there is increased confidence and uptake in their use by organisations. Assessors positively report effective one-to-one and group discussions, and the ability to share documents using such platforms.
* The planning of assessments is enabling the organisation to develop a schedule using online calendars to book remote appointments and this is supporting robust attendance and participation, combined with flexibility.
* There are new opportunities to use technology to bring small groups of people together from a range of locations that previously would not have been possible or would have involved travel and time.
* Screen sharing within video calls is commonplace along with online classrooms and secure work drives. This presents the assessor with new opportunities for evidence gathering which have been recognised within the assessment process.
* Practitioners and quality staff report that remote assessment is as robust in gathering appropriate evidence as on-site assessment.

As a result of this learning, we will continue the use of remote assessments by default. For initial assessments at least an element of onsite assessment will be required. Customers will be able to choose onsite in-person assessment at their discretion, for example where vulnerable recipients are involved or simply to better reflect the IAG delivery model. Assessors will be able to negotiate with customers whether assessments take place remotely or onsite. Also, onsite visits will continue where significant change has taken place and a site visit will enable the Assessor to become acquainted with the organisation.

# Guidance Materials

The following Guidance Materials have been developed to support the revised version of the Standard.

**The Gatsby Touchpoints Document** – Partnering with the Gatsby Foundation, CDI and Careers and Enterprise Company to produce a guide which shows the Standard supports the Gatsby Benchmarks.

**The Ofsted Touchpoints –** We commissioned aconsultantformer Inspector to work with Ofsted to produce a guide which shows the touchpoints the Standard has with the inspection framework.

## Sector Guidance

We are currently working on the development of the following Sector Guides:

**Further Education Guide** - Working withGatsby Foundation, CDI and Careers and Enterprise Company a guide for FE will be available.

**University Guide** – Working with The Association of Graduate Careers Advisory Services (AGCAS) a guide that shows how to apply the Standard in Higher Education.

**National Careers Service** – The National Careers Service guide which last updated in 2021 to reflect the new Standard.

**Employability Guide** – The current guide is called ‘Welfare to Work’ this is being updated to an ‘Employability Guide’. We are working with the Institute of Employability Professionals to produce this guide.

**Digital Guide** – A new guide will demonstrate how to apply the Standard in a fully digital or blended delivery model.

**Special Educational Needs and Disabilities** (SEND)- A new guide is in production which looks at the application of the Standard in a SEND environment.

**Other Guides** will be updated including Sixth Form, Sole Trader, Money and Pensions Service and The Welsh Government IAQF Guide.

# 

# Appendix 1 – Advisory Group Membership

### **matrix** Accredited Service Providers

* Babington
* Brook
* Valkyrie Support Services
* The Coalfields Regeneration Trust
* Gloucestershire College (2 representatives)
* Keith Cook Training Ltd
* Northamptonshire Adult Learning
* Firebrand Training Ltd
* M.I.T. Skills
* Oldham College
* Qube learning
* Southampton City Council - Communities, Culture, & Homes
* The Careers Group (6 representatives)
* The Open University
* Education and Development Trust
* Growth Company (2 representatives)
* Prospects
* Hopwood Hall College
* Hartlepool Borough Council (2 representatives)
* Leicester City Council
* Ambitious About Autism (2 representatives)
* Fareport

### Other Service Providers

* Toolshed/ New Meaning

### Strategic Stakeholders

* Skills Development Scotland
* Association of Colleges
* AGCAS
* WMCA (2 representatives)
* Citizens Advice (2 representatives)
* Quality in Careers
* Lantra
* iCeGS
* Money Advice Pensions Service
* Gatsby Foundation (2 representatives)
* Careers and Enterprise Company
* Holex

### Practitioners/ Consultants

* 3 named **matrix** practitioners
* Former Ofsted Inspector

# Appendix 2 – Pilot Organisations

### Full Pilots

* Go4it/ Core Values
* Coalfield Regeneration Trust
* Torus Foundation
* Leicester City Council - Adult Learning
* The Education Development Trust
* ATS
* Brook
* Watford Women's Centre Plus
* Dimensions Training Solutions (DTS)
* Lindsay Evans Careers Guidance Services Limited
* Community Learning & Skills Team - Cumbria
* Go Train
* Street League: England
* Colchester Institute
* 1st2Achieve Training
* Direct Education Business Partnership
* The Cambridge Housing Society

### Continuous Improvement Check Pilots

* ENHAM TRUST - Skills 2 Achieve
* DHI - Developing Health & Independence
* Western Vocational Progression Consortium
* Wiltshire Council - Family & Community Learning
* The Hope Foundation
* Winnovation
* National Horse Racing College
* Serenity Academy
* Inspire Culture
* Norfolk & Suffolk Care Support Ltd.

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**Appendix 3 Glossary**

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| --- | --- |
| \* **Recipient** | This is the generic term used in the Standard to refer to the person/s who receive the IAG. Organisations may call ‘recipients’ customers, clients, service users, beneficiaries, participants. In some IAG service delivery, the recipient is another organisation. |
| Advice | This is the provision of advice, over and above the provision of information. It may require an explanation of some of the information provided and how to access and use information and identify the need for and location of, follow-on services, including in- depth services such as guidance or casework. |
| Careers Education | Careers education is the delivery of learning about careers as part of the curriculum. Careers education involves a range of planned encounters and experiences, including experiences of the workplace and other forms of work- related learning. |
| Continuous Professional Development | The development activities that staff engage in to ensure they retain and extend their skills and knowledge to support the delivery of their IAG role. |
| Digital | Digital may include a range of technology such as (not exclusive): AI, websites, video conferencing, chat bots and social media. |
| Distance travelled | These are tools and techniques that can be used to demonstrate the progression of recipients in areas such as skills or personal development such as confidence, aspiration. |
| Equity | Equality and equity refer to similar but slightly different concepts (although are often used interchangeably). Equality generally refers to equal opportunity and the same levels of support for all segments of society. Equity goes a step further and refers offering varying levels of support depending upon need to achieve greater fairness of outcomes. |
| EDI | Equity, Diversity and Inclusion. Some organisations may use the term Equality and Diversity. Together these terms are about ensuring that all people connected with or could be connected with the organisation are treated in a way that they feel a sense of belonging. This will be demonstrated in a number of ways but will include knowing and addressing each individual's needs and making relevant adjustments. |
| Evidence base | In the context of Element 7, this is about capturing findings from a range of sources, for example: feedback, observations of practice, review of action plans, self-assessment reviews etc. The findings from these together will enable developments to your IAG. |
| IAG | Information, Advice and Guidance. |
| Impact | The overall benefit gained from delivering the IAG. These will include a measurement, for example a percentage, or increase/decrease. Impact may be measured at cohort, service or organisation level. |
| Information | This is the provision of information without any discussion about the relative merits of each of the options. It can be provided through printed materials (such as leaflets), audio-visual materials, computer software and / or verbal information to the service user on a face-to-face basis or by another channel such as through digital means. |
| Guidance | This is an in-depth interview or other activity conducted by a suitably trained adviser, which helps clients to explore a range of options, to relate information to their own needs and circumstances and to make decisions |
| Outcomes | The difference the IAG makes/has made to those receiving it. This may include by soft and hard outcomes specific to the individual. |
| Personal circumstances | Depending upon the nature of the IAG being provided, this may cover employability, health, wellbeing, finances, confidence |
| Progression | Progression is about moving to a different position, for example progression into the IAG service, progression within it and/or progression beyond. |
| Promotion | Activities will be in place that enable potential recipients to find out about the IAG. Access may be through referral, self-referral, outreach, social media, advertising etc. |
| Purpose | The IAG will be delivered in the context or purpose of your organisation – the reason you offer your services. For some organisations, their IAG delivery is their main purpose and therefore the purpose of their IAG and the purpose of their organisation is one and the same thing, and this clarity will already be in place. For other organisations, IAG may contribute to wider organisational aims and demonstrating the link between the IAG offer and the overall purpose will be important. |
| Resources | This may include human, physical, and digital resources. The Standard does not prescribe the level of resources that should be allocated to the IAG service but seeks for services to be appropriately resourced to meet their purpose. This may include consideration of how staff manage their caseloads/workloads and the support they are provided with this. |
| Safe | This refers to a range of policies and practice to help ensure the safety of staff and recipients. This encompasses, as appropriate to the organisation and their client group/s, aspects of safeguarding which could include online safety, bullying and harassment. Staff delivering IAG may have different roles in supporting this, for example referral to a safeguarding lead. |
| Signposting and referral | Signposting and referral are terms that are often used inter-changeably. Signposting is where the service needed is not provided, and where, usually, no relationship has been established with the recipient. Information is provided on alternative providers. Referral is an active response to a recipient’s need where alternative/additional provision is needed, and steps are taken to introduce the recipient to the new provider and support the handover. |
| Soft outcomes | These are the progression steps made by a recipient in areas such as confidence, self-awareness, motivation, aspiration. These may be captured through a distance travelled model. |
| Staff | Any people paid or unpaid (i.e. volunteers) who deliver your IAG |
| Statutory guidance and legislation | Organisations need to know the statutory guidance and legislation that is relevant to their service. This may include Safeguarding of Vulnerable Groups Act, PREVENT, SEND Code of Practice |
| Wellbeing | This is the state of being comfortable, healthy, or happy. Individuals’ sense of wellbeing may be affected by a number of factors, such as their mental health, their financial wellbeing, relationships etc. |





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Registered Office: Lee House, 90 Great Bridgewater Street, Manchester, M1 5JW

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**e:** [matrixStandard@growthco.uk](mailto:matrixStandard@growthco.uk)

**t:** 01423 229665