

Thursday 26th January 2023

9.30 am to 12.30 pm

Action Notes

Present: Avril Hannon (EPSC Chair), Lisa LaRue, Cordelia Wise, Elaine Newell, Mark Yates, Sue Edwards, Vicki Love, Luisa Moreno, Claire Johnson

In attendance: Nicki Moore, John Walker and Liz Treadwell, CDI Executive Assistant (Action Notes)

1. Apologies: Mark Fox, Lydia Lauder, Ciara Bomford, Hannah Courtney-Bennett

2. Introductions

Avril welcomed everybody to the meeting and new members Sue Edwards (Professional Development) and Cordelia Wise (Voluntary and Community Sector).

Avril also welcomed Liz Treadwell to the meeting and explained Liz is employed by the CDI and will take the Action Notes of future meetings as well as collate and distribute constituency reports in advance of each meeting.

Avril said, as a result of the recent election process, Sue Edwards is the representative for Professional Development. John confirmed today's meeting as his last and gave thanks to the committee and hopes contributions made have been useful and thanked everybody for their help and support. Avril thanked John for all of his contributions to PSC.

Avril gave thanks to Elaine for her many contributions to PSC. Elaine thanked the committee and for such professional support and friendship.

Avril confirmed second term of office ends for herself, Elaine Newell and Lydia Lauder. Apologies received from Lydia for today's meeting therefore Avril wished to record thanks for all of Lydia's help and support.

3. Declarations of Interest – None

Avril enquired whether committee members have received an email to sign a declaration of interest. If not, an email will be on its way to committee members shortly. Avril said the reason for declarations of interest being sent and subsequently signed is to ensure the CDI has a central register of interests. Avril added a discussion will take place at a future CDI Board meeting with regards to who will be responsible for the information as well as the maintenance of such records.

4. Update on Charter Status (Nicki Moore)

Avril introduced Nicki who has been undertaking research on behalf of the CDI into Chartered Status.

Nicki presented a PowerPoint Presentation entitled 'Chartered Status Phase 2: Project Findings – January 2023'.

Nicki referred to the Executive Summary shared with the committee in advance of the meeting. She confirmed high level of interest in the project across the sector and how this affects a wider group of people rather than just CDI.

Nicki confirmed first phase was a scoping phase to understand what chartership involves. She spoke about the challenges of the project from a political point of view as well as a stakeholder point of view. Focus groups and consultation events have taken place and production of a large, inclusive report which includes questions and aims raised as a result of the research. Nicki stressed the importance of involving all stakeholders to set objectives and make recommendations.

Objectives:

- Establish stakeholders (organisational and corporate).
- Perceptions of becoming a Chartered profession.
- Extent of/what are the drivers.
- Costs (process and practice).

Participants:

- 657 people involved in the survey.
(Scottish Focus Group = 9, Welsh Focus Group = 7, NICEC Cutting Edge event = 22, Survey = 619)

What did people tell us?

Quite clearly, people are interested and would like the project taken forward. Reasons given for the interest are an improved experience for clients, raising the profile for career professionals and greater focus on CPD.

Concerns raised by participants included: how Chartered Status could be divisive by creating a hierarchy and concerns over the way it could be unequally applied in areas such as private schools v colleges and schools. Nicki confirmed concerns have also been raised over cost implications and the resources needed for individuals in terms of assessment and process costs.

Nicki said there is a need to understand the difference between individual chartership and the existing process of Registration. There has been some confusion raised by participants regarding this.

Nicki said people are very positive about undertaking an assessment for individual chartership and added how this should provide stretch for people. She added the preferred level of any assessment for this is postgraduate level.

Who should lead this?

Nicki said that the majority of participants would like CDI to lead and take a collaborative approach, collaborating with partners to a point where a petition can be arranged.

Nicki indicated the importance of having an evidence-based approach and the need to have areas for investigation in place. She said it's highly likely the agenda is too much for one organisation to manage and suggested a cross-sectoral approach is the best approach.

Nicki concluded by confirming the subject of Chartered Status was discussed and reviewed at CDI's Board meeting on Wednesday 25 January 2023 whereby confirmation was approved to commence a development plan to progress to the next stage and have more formal conversations. Nicki, along with Claire and Professor Siobhan Neary, Head of iCeGS at the University of Derby, will be writing an article for the British Journal of Guidance and Counselling and work for this will begin in February. Nicki mentioned the possibility of an open webinar being planned too.

Nicki welcomed questions from the committee. John referred to the positivity received from the research undertaken so far and said how wonderful it will be to pursue this further. He mentioned, when qualified, there needs to be a progressive nature of continuing with a professional journey and added an alignment of qualifications may be more of a challenge. Nicki said, should chartered status be achieved, individual charter will balance this out as individuals can move between home nations. It may be good to undertake a mapping exercise regarding key delivery at a later stage.

Avril referred to the potential benefit of protecting the public by recognition of what constitutes professional careers guidance. Nicki indicated media perception of the profession needs to change and the conversation/narrative around the messaging that is put out to the public.

Avril enquired whether the committee could do anything to support the ongoing research. Nicki said it will be extremely useful for the committee to share any negative articles in relation to career guidance (online conversations and counter arguments) to ensure all viewpoints are monitored and recorded. Moving forward, Nicki said there will be roles for EPSC members to be involved along with volunteers to join the group working on the next stage of the plan.

Sue referred to AGCAS and whether there are any lessons to be learnt following their pursuit of chartership. Nicki was not aware of AGCAS pursuing this and Claire had not heard about this either. Nicki said, should any information be available regarding this, it will be interesting to see it.

Avril gave thanks to Nicki for such detailed research and the committee will look forward to receiving further updates in the future. The message coming from the CDI Board is very positive starting with a more detailed plan.

5. Reminder about EPSC Terms of Reference

Avril referred to approval of new Terms of Reference (ToR) at CDI's AGM held on 8 December 2022. Avril said the committee is now called Ethics & Professional Standards Committee (EPSC) and confirmed Claire joins as a full member of the committee. Avril welcomed Claire to her rightful place as a member of EPSC.

The other change noted by Avril was the Chair of EPSC is now a Director of the Institute and a full member of the CDI Board. At the recent Board meeting, Avril suggested the Board and EPSC should both check regularly whether any topics covered need to be reflected and/or highlighted to the respective group.

Avril asked Claire whether the new ToR's are on CDI's website yet. Claire said the new ToR are not showing yet as Nicki will need to be involved once the CDI website is updated. Avril suggested it will be useful for the committee to read through a copy of the ToR (sent with meeting papers).

6. CDI Code of Ethics

(6a) Shortened version for use with clients (Mark Fox – apologies received)

Avril confirmed Mark Fox was unable to attend the meeting and is happy to take this forward and receive comments and feedback from the committee. General feedback received as follows:

- Definitions needed against eleven principles.
- Equality to be addressed as one point rather than split.

- Possible change to the vocabulary to provide more than just 'information' as this lends itself to misconception as a profession.
- Duty of Care section – may need changing?
- The possibility of having visual images/illustration journey incorporated for an all-inclusive approach to help capture the essence of the explanation.
- Change the word 'encourage' (number 3) to 'help' to ensure the person, rather than the adviser, is in the driving seat.
- Possibility of adapting the document for people who do not use English as their first language.
- Disability (number 9) may need to be a wider approach to capture everything as it is more than a health need.
- CPD needs to be recorded more robustly rather than keeping up to date with 'information'. It's essential to keep expertise to a certain standard/level and ever evolving.
- Possibility of having a customer charter to broaden information or a one-page document to advise what a Careers Adviser does.

ACTION

- Luisa offered to work with Mark on the revised shortened version for clients. **LUISA & MARK**

(6b) Birkbeck Impartiality issue and possible CDI Position paper (Claire)

In September 2022 Birkbeck, University of London made a decision to be the first UK higher education institution to end fossil fuel industry recruitment on campus. Claire said Birkbeck Careers Service are clear in terms of continuing to provide impartial advice to students. The university, as a whole, has decided it's not having exhibitions from certain employers. This is also not unique to fossil fuels as several other industries are included in decisions at other universities. Claire referred to a useful summary issued by Chris Webb which details pros and cons relating to this.

Claire raised the question whether CDI need to have a position statement in terms of impartiality to remind practitioners of their own impartiality. Claire said, in the past, CDI have written a position paper on various topics.

Mark Yates suggested individuals may wish to talk through issues and challenges with their employer/institution, therefore unsure how a position statement will serve a purpose. John referred to the Code of Ethics as the idea of impartiality is explored within the code. Claire suggested having contextual guidance to go alongside the Code of Ethics.

Avril surmised a lack of appetite for a position paper and suggested contextual guidance is the best way forward.

(6c) Transparency Principle and the need for any additional wording (Avril & Claire)

Avril asked the committee to consider whether there are any changes needed to the Transparency principle in the Code of Ethics. Claire added a discussion could take place at a future meeting to allow adequate time to discuss the matter in full. She said this matter came up because of Chris Targett's paper, and noted it is the shortest principle in the Code. Claire also questioned whether there is a need to review the Equality principle again as several organisations have Equity noted as a principle rather than equality.

Avril referred to Emma Bolger's work on a framework for checking that equality and diversity principles are met, which might be applied to all the Principles in the Code. It was agreed that it would be a useful exercise to review other organisations (such as those used in Nicki's research project) to check their codes of practice.

Where changes are needed, Avril suggested making them in a timely manner and proposed having adequate time available at the next meeting to look at the transparency principle and the equality principle, and to consider whether any other principles need to be addressed.

ACTION

- To discuss any changes to the Code of Ethics at the next meeting. **ALL**

(6d) To consider the need for contextual guidance for all of the principles

This agenda item was discussed under 6(b) and will be discussed again at a later meeting.

(6e) Feedback from QCD Centres about Case Studies (Claire)

Claire said an email has already been circulated to QCD centres with regards to involvement in future case studies. Claire confirmed that all centres like the case studies and have used them with students. She said that Sue Edwards, Susan Meldrum and Paul Gaunt would be willing to be involved in the development of any case studies in the future. Claire said Ann Chant has a practitioners' network, who meet monthly, and Ann intends to ask them about different dilemmas that come up which will subsequently be fed back to Claire to ensure current scenarios are available to take forward for future case studies.

Claire said QCD Leaders meet twice a year. Claire and Sue can feedback at this meeting and Sue may wish to take this forward with the others noted above. Sue confirmed that she is happy to do this.

Avril enquired whether there has been any advance on a forum for ethical dilemmas to be considered by members. Claire said this forum is documented in previous meeting notes and referred to a section going into Career Matters to ascertain how members envisage tackling such dilemmas. Feedback could then be updated in a later edition along with information noted on the new CDI website. Lisa stated it will be useful to have information noted on the CDI Facebook group too.

Sue confirmed it will be a positive approach to have a regular feature in Career Matters as well as utilising social media to full effect. Avril agreed feedback needs to be reviewed with the ability to synthesise it in a way that is accessible to other people. With regards to a feature in Career Matters, Avril suggested there needs to be adequate space available. Claire said that the June edition of Career Matters will have Ethics as the theme.

(6f) Carolyn Parry and Synthesia Issue (Claire)

Avril referred to a recent conversation with CDI President, Carolyn Parry, regarding a software product called Synthesia which behaves like a real person and can be programmed to provide careers advice. Carolyn's worry is individuals may believe they are talking to a real person and how does anybody know the advice being given is correct. Avril mooted the possibility of having information available for members in terms of what to look out for when utilising such software. Claire suggested the end user may need to have pros and cons available for review too.

It was agreed to ask Michael Larbalestier, CDI Digital Associate, to work on a guide for general and ethical practice when using technologies which might also be used as a webinar at a later stage

ACTION

- To contact Michael to discuss this idea.
- To feedback the views of EPSC to Carolyn.

CLAIRE
AVRIL

At this stage in the meeting, Mark Fox tried to join via telephone, however, Mark was unable to join and subsequently gave his apologies.

(6g) ESFA and Customer Charter (Vicki & Claire)

Claire met with Vicki a couple of weeks ago and discussed how useful it will be to have a mention of using a code of ethics in the National Careers Service Customer Charter principles. Claire has contacted Ray Plummer at DfE and the matter has been discussed as part of the Customer Charter review. Some progress has been made with this and final decision awaited by DfE. Vicki said that the National Careers Service has a tool called COACH which is utilised by NCS staff and which makes reference to the CDI Code of Ethics.

7. UKCDA Judging Panels and CDI Fellowships (Avril)

Claire said nominations for the Awards are currently open and the final decisions will be made by 15 April 2023. Judging panels will consider the shortlisted entries between 15 March and 16 April. The awards ceremony will take place on 26 June 2023 at Hilton Hotel at the East Midlands Airport near Derby. Claire enquired whether any committee members would like to be a judge on any of the panels.

Avril added judging panels usually consist of three to four people for each of the awards and it is extremely helpful and rewarding to have EPSC members on the panels as well as some of the regional reps. CDI Board undertake the shortlisting of the applications prior to the judging panels taking place. Avril had reminded the Board at yesterday's Board meeting of the need to ensure all shortlisted applications meet the relevant criteria before reviewing the merit of the various nominations. Coordination of judging panels and decisions will be undertaken by Avril as the Chair of EPSC and she will liaise with David Morgan, CEO of CDI.

Avril said, once shortlisted entries are announced, there will be a need to review conflicts of interest, and should any issues come to the fore, some rejigging of judging panels may have to take place.

Claire happy to act as a spare judge should there be any conflicts of interest or sickness issues.

The committee confirmed interest on the following panels:

Lisa	Digital (use of technology)
Sue	Research
Louisa	Careers Adviser/Coach of the year
John	Careers Leader
Mark	Happy to pick up on any categories that are left.
Elaine	Careers Programme (pre- or post-16), Careers Adviser, Careers Leader

Cordelia Public sector Careers Adviser/Coach of the year or Private sector Careers Coach/Consultant of the year
Vicki Innovative employer engagement

Avril confirmed John Walker can be involved in the judging panel for Career Development awards.

ACTION

- Contact Hannah, Lydia and Mark Fox and regional reps to check availability and interest in joining judging panels. **AVRIL**

With regards to CDI Fellowships, Avril said how keen she is to expedite the panel and looked to ESPC to join the judging panel (via Zoom/email) to review the nominations for fellowship. Mark Yates and Claire said they are happy to represent the committee.

Avril confirmed a notice will be sent to all CDI members asking for nominations. EPSC members can make nominations individually as well as making nominations direct to Avril. Avril said there is a requirement to have a short resumé telling members of the judging panel who the person is to aid with the decision-making process.

8. Constituency Reports

Liz had circulated constituency reports in advance of the meeting. Due to time constraints Claire asked the committee if any queries or questions need to be raised following the circulation of the reports. No questions raised.

As new members, Claire clarified both Sue and Cordelia did not have to submit reports for today's meeting, however, reports will be forthcoming for future meetings.

Avril referred to the time and commitment involved in producing such detailed reports and suggested the next Chair may wish to look at alternative methods of reporting to avoid an increase in workloads for the relevant committee members.

9. CDI Professional Development Update (Claire)

The report on Professional Development had been circulated prior to the meeting. Claire confirmed CEC contract has been extended to December 2023 which enables greater capacity for additional candidates. Original number of candidates set at 160, however, now able to potentially take 240. With regards to supervision, both John and Rachel ran another supervision training webinar and there was a struggle to get people to attend. Claire said Michael Larbalestier is looking at a Moodle approach which people can access 24/7 complemented by a meeting with Rachel and John. John, Rachel and Claire to meet with Michael to discuss further.

10. CDI new website update (Claire)

Claire confirmed CDI are in the process of updating and revising the company website. Claire suggested having a presentation of the new website at the next EPSC meeting. This can be provided by David Morgan CEO or Dan Hope, Digital Services Manager.

ACTION

- Once next meeting date identified, Liz to invite David and/or Dan to provide the committee with an update on the progress made with the new CDI website. **LIZ**

11. Chatbots paper from Deirdre Hughes (Avril)

Committee members offered the following comments: Duty of care is not noted currently. It was agreed there should be reference to having a duty of care for people reaching out for support. For example, should an individual have a mental health issue or be in a state of emotional or psychological distress, there's a need to have a duty of care.

Sue questioned the use of the words 'information and advice' due to chatbot only being able to provide information rather than guidance.

Other careers information/advice Chatbots exist and could be referenced e.g. the National Careers Service This information will be fed back to Deirdre and the chatbots paper discussion will continue at a future meeting.

ACTION

To feedback the views of EPSC to Deirdre.

CLAIRE

12. Action Notes 9th September 2022

Claire confirmed most items have been discussed throughout the meeting. The only other point Claire wished to raise was in relation to code of ethics forming part of the C&EC impact review pilot documentation. Claire attended a meeting with C&EC two days after the last EPSC meeting and referred to code of ethics and suggested that this was included in the documentation so that schools know that a person who is a CDI member abides by the Code of Ethics and is therefore impartial. She also suggested inclusion of Careers Advisers being qualified at level 6 or above in career guidance/development. Claire said this was agreed and is now included within the new documentation.

13. AOB

With regard to EPSC vacancies, Avril confirmed the nomination process will take place during February. Chair of EPSC will be advertised along with two elected members of the Board and the Honorary Secretary role followed by further Board and EPSC elections.

Avril confirmed CDI plan to develop a calendar of meetings and EPSC meetings will be noted in the calendar too.

14. Date of next meeting

Claire confirmed the date of the next meeting will be confirmed once a new EPSC Chair and new EPSC members have been decided. The date will also need to be co-ordinated with the date of the next CDI Board meeting.

Claire thanked Avril for all her work in planning for and chairing EPSC meetings and her support with many other aspects of the work of the CDI. Avril reciprocated and wished the committee well for the future.

Appendix

Constituency Reports

CDI Ethics and Professional Standards Committee: Constituency Reports, 26th January 2023

Professional Constituencies

Career education/leadership in schools/college/HE: Elaine Newell and Mark Fox

Elaine Newell

New careers programme for primary schools announced

- The government has announced a new careers programme to support 2,200 primary schools in disadvantaged areas to deliver careers education programmes.
- The programme is aimed at exposing primary aged children to a wide range of future job possibilities and challenging stereotypes about certain careers.
- The programme will provide children with opportunities to meet ‘employers and role models from a range of industries,’ as well as help teachers link lessons to different careers, training, and skills.
- £2.6 million has been given to the scheme, which the government believes will support more than 600,000 pupils. It will see teachers in over 2,200 primary schools in fifty-five disadvantaged areas receive training on delivering the primary school careers programme.
- The programme will be coordinated by The Careers & Enterprise Company (CEC) with training being provided by Teach First.

Wales – New pilot programme giving young people insight into the world of work

A number of Welsh schools will take part in a new pilot project helping to prepare young people for a career and to understand their working rights.

Aimed at young people aged 13-16 years old, up to thirty-five schools from across Wales will take part in the new Unions and the World of Work programme, as part of the new Curriculum for Wales.

Schools’ collaborations with businesses are already providing learners with opportunities to learn about work and employment. Developing the skills required by employers, and to raise the aspirations of all learners in considering the full range of opportunities available to them.

In this new programme, the Welsh Government has worked with the Wales Trades Union Congress (Wales TUC) to highlight themes including workers’ rights and equalities, healthy working environments, and the role of unions.

Inquiry – Future of post-16 qualifications announced

The Education Committee continues with its inquiry examining how effectively post-16, level 3 education, and qualifications (A Levels, T Levels, BTECs and apprenticeships) prepare young people for the world of work. The Committee is looking at the Government’s current work and proposals in this area and whether an alternative model, which might enable a greater blend of academic and vocational pathways, should be explored.

The Government has several proposals underway on post-16 qualifications:

- Level 3 qualification reform: The Government has responded to its consultation on reforming level 3 qualifications, with a policy statement published in July 2021. This sets out a timeline for reforms to level 3 qualifications, which includes defunding from technical qualifications that overlap with T Levels
- The Skills and Post-16 Education Bill, which had its second reading in the House of Commons on Monday 15 November
- The further rollout of T Levels. The Committee's new inquiry will look at the impact of these changes and whether existing and proposed arrangements go far enough to prepare young people for the world of work.

The Committee's new inquiry will look at the impact of these changes and whether existing and proposed arrangements go far enough to prepare young people for the world of work.

Mark Fox

Some interesting observations from school, college, and university advisers about their work with young people this term, although not as many returns as usual due to the proximity to Christmas and high staff absences across the region due to illness:

- Careers Leaders seem to be more stretched than ever – attendance at meetings/training gone down, lots of CLs covering other staff/duties
- Almost thirty new Careers Leaders this year so far – around 20% of the region's cohort and like other English regions
- Organising work experience remains a key challenge in extremely difficult labour market conditions therefore many young people in all phases of education missing out
- Appointments are fully booked – students have a real need for 1:1 currently
- Main issues about understanding their pathways and making applications
- Still, lots of Covid catch up work in the university
- Many not been able to undertake work placements
- Lack of confidence about entering workplace
- Face to face delivery has started and extremely popular (e.g., two careers' fairs)
- Finding that lots of Y13s not wanting to go to university but start work/training
- Busiest it has been in the Connexions NEET team for a long time – a real need from young people for the service
- Lots of vulnerable young people and families currently
- Students not being let out of lessons for careers interviews due to catch up time in school
- Students do not seem to be very motivated, many not wanting to go to university but look for degree apprenticeships (which are hard to find)
- Covid still making young people nervous
- Strong focus on destinations and ensuring all students have a pathway due to disruption from the last two years
- Still issue of 1:1 guidance time being squeezed into school programmes leading to shorter personal guidance sessions especially when bigger numbers in year group
- Lots of demand for 1:1 guidance from students
- Conversations often start in one place and end somewhere quite different
- More self-referrals and referrals from college staff

- Stick to recommended time of 45 minutes per personal guidance session as a meaningful session cannot be undertaken in less time
- Many Y13s do not seem to want to go to university
- Also, more students not wanting to leave home (Covid-affected?)

Career guidance/coaching in the private sector: Lisa LaRue and Hannah Courtney-Bennett

Private Practice Steering Group

An update on the Private Practice Steering Group

The Advisory Group of the Community of Interest for Private Practice last met on 1st December. The group is continuing to progress the suggestions raised in the survey held in May 2022.

Many of the training topics raised in the survey were not specific to private practice, therefore David Morgan and Jen Ellin (CDI Events & Commercial Manager) are going to consider what to include in the core CPD programme and the Community of Practice will then consider what they might arrange.

Most notably, the CDI are developing a series of private practice-related panel discussions, the first focusing on members who have broadened their practice beyond school-based work. The session is planned for February and further information will be posted when available.

The CDI and Advisory Group are also exploring the potential for a private practitioner-focused 'conference' over three half-day sessions covering: 'getting started', 'improving' and 'expanding' your business. These are intended to cover the business of running a successful career development practice and apply to everyone whether starting out or looking to enhance their work.

Career guidance/coaching in the public sector including educational establishments: Mark Yates and Luisa Moreno

Mark Yates

- UCAS applications roughly on track with last year
- Human physical health careers still extremely popular, especially relating to mental health
- Increased interest in apprenticeships and degree apprenticeships still ongoing

Luisa Moreno

- The Careers Review in Scotland is progressing with final recommendations being formed. A new Career Development model is recommended, and this model is being codesigned with individuals. The pending changes, together with the new model, represents an ambitious redesign of the Scottish Career ecosystem.
- Skills Development Scotland is in the middle of an independent review, directed by the Government, led by James Withers. It may impact the shape of SDS and our service delivery model.
- A coaching approach to the delivery of Guidance and the development of Career Management Skills continues face to face in all public schools in Scotland. Digital and virtual support continues to support and compliment face to face delivery – which includes group work in schools and post schools

Professional development including training/research/sector development:

Lydia Lauder

Report to follow.

National Constituencies

Wales:

Ciara Bomford

Careers Wales and Skills Development Scotland Collaboration on L&D

- L&D teams from Careers Wales and Skills Development Scotland got together for an afternoon of ideas sharing and were very energised by finding much common ground but also areas where we could learn from each other. A further session is planned for the new year where SDS will share how they approach peer learning and Careers Wales will share how they approach standardisation and moderation, and the intention is to continue to collaborate.

LMI Webinars

- Careers Wales has put on a monthly webinar throughout 2022, with sectors based on the Regional Skills Partnership's priority sectors. Attendance from careers advisers has been high, and they will continue into the new year. Employers have also been incredibly pleased with how the webinars have run, and more employers want to take part to promote their sectors.

Mid-Life Career Reviews

Careers Wales is now offering mid-life career reviews to all over-fifties, and others would benefit. This can include use of Morrisby profiling, and all advisers are now trained to deliver it. Other CPD for advisers has included Menopause Awareness, Working with Carers, and a workshop on Mid-Life Career Reinvention with Dr Cathy Brown.

England: Vicki Love

Nothing to report.

Scotland and Northern Ireland: Vacancies