CDI CAREERS LEADER TRAINING

EXTENSION PROGRAMME WORKBOOK

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Introduction to the Extension Workbook

This workbook supports the two Extension days of the CDI Careers Leader Training programme. It contains the activities and practical tools used during the sessions. The emphasis is on applying learning to your own organisational context, analysing evidence, making professional judgements and recording actions.

The workbook is intentionally activity-focused. Supporting information and further reading are provided separately in the Extension Resources Guides.

How to use the workbook

Use the space provided to capture your analysis, decisions and next steps. Where an activity asks you to work with your own setting, use current organisational evidence wherever possible. You can return to these tools after the training to support strategic careers leadership and improvement.

DAY 1 – Leading People, Resources & Change

From coordinating provision to leading it strategically.

Strategic Leadership Baseline – Slide 3

Identify where your current role sits across the four areas below.

Area	What I currently do	Where I need stronger strategic leadership

One area where I need to move from coordination to stronger strategic leadership:

Case Study – Whose Job Is Careers? – Slide 6

Oakfield Academy is an 11–18 school with 1,200 learners. Priya is the Careers Leader and reports to an Assistant Headteacher, but she has no line management responsibilities. Compass shows inconsistent curriculum-career links. Science says staff have no capacity for more careers work; the SENDCo is concerned that some employer activity is not accessible; tutors report mixed confidence; and the external Level 6 adviser has little contact with curriculum staff. SLT tells Priya: “You’re the Careers Leader — we need you to get everyone on board.”

Question	Your analysis
What can Priya control?	
Where must she influence?	
What needs negotiation?	
What should be escalated?	
Which sources of influence could she use?	
What should she do first – and why?	

Leadership Model Comparison Tool – Slide 10

Critically compare at least three models. Use evidence from your own organisation and consider limitations as well as strengths.

Leadership model	Fit with my organisation	Limitations / risks	Evidence / justification

Which model, or combination of models, is most appropriate for your organisation – and why?

Your Business Case – Slide 15

Build a real case for support. Make the decision you need from your audience explicit.

Need	Evidence	Learner benefit	Organisational priority	Resource / risk	The ask

Now adapt the same case for a second audience.

Audience	What will I emphasise?	What evidence will matter to them?	What decision / commitment do I need?

Case Study – Everyone Is Involved, Nobody Owns It – Slide 18

At Greenfield College, tutors deliver careers learning, Heads of Department are expected to embed curriculum links, the SEND team adapts provision, an external adviser provides guidance and the Careers Leader coordinates employer activity. Everyone is supportive, but delivery dates are missed, some groups receive more than others, nobody checks whether curriculum activity has happened and staff assume someone else is monitoring quality.

Redesign the responsibilities so shared delivery does not mean blurred accountability.

Outcome / activity	Accountable	Who delivers?	What can be delegated?	Milestone	Evidence to monitor

When should the Careers Leader intervene?

Budget Challenge · Slide 21

Riverside School has £2,000 of discretionary careers funding. You cannot fund everything. Allocate the budget and justify your choices.

Option	Cost	Fund?	Rationale / evidence
Accessible SEND resources	£450		
Staff CPD/resources	£350		
Workplace visit transport	£600		
Targeted guidance top-up	£800		
Curriculum-career resources	£300		
Parent/carer information activity	£250		

Total allocated:

What non-cash resources or alternatives could strengthen your plan?

Case Study – Competing Priorities – Slide 23

Westbrook Academy wants to strengthen curriculum-career links. Only 31% of learners can explain how subjects connect to future opportunities. SLT supports improvement but will not release extra curriculum time. Science believes it already meets expectations; Humanities wants CPD; the SENDCo says resources are not accessible; tutors report inconsistent confidence; and the Careers Leader has no line-management authority.

Question	Your response
What is the underlying problem?	
Whose support is essential?	
What change approach fits – and why?	
What will you delegate or negotiate?	
What resources are genuinely required?	
What evidence will show progress?	

Simple Project Management Tool – Slide 24

Scope / outcome	Milestones	Roles / responsibilities	Dependencies	Resources	Risks	Evidence of success

Day 1 Toolkit · Keep · Change · Create · Slide 25

KEEP – what is working?	CHANGE – what will I do differently?	CREATE – what needs putting in place?

One action I will take before Extension Day 2:

Evidence that will show progress:

DAY 2 – Leading the Organisation's Careers Strategy

From leading activity to creating sustainable, accountable careers provision.

Reconnect – What Happened After Day 1? – Slide 2

One conversation	One action	One thing I noticed

What does this tell you about your leadership, influence or organisational context?

Case Study – Busy, Successful… and Disconnected? – Slide 6

Elmwood Academy has enthusiastic staff, many employer activities and strong event feedback. However, year groups receive different activities with little sequencing; departments use different learning outcomes or none; SEND learners attend fewer employer activities; evaluation focuses on attendance and satisfaction; and no single leader can explain the complete learner journey.

Programme test	Diagnosis / evidence	What needs to change?
Learner need		
Outcomes		
Progression		
Ownership		
Evidence		

What should stop or change?

What are the first TWO priorities?

Case Study – Consultation or Confirmation? – Slide 8

Northbridge College plans to replace its Year 11 careers programme. The Careers Leader has already drafted the new model and sends an online survey asking learners and staff whether they “support the proposed improvements”. Response is 18%. Most replies come from high-attaining learners and staff already involved in careers. The SEND team, parents/carers and external adviser were not consulted.

Question	Your analysis / redesign
What is wrong with the question?	
Whose voice is missing?	
What evidence is unreliable?	
Which methods would be better?	
What should still be open to change?	
How will findings be reported?	

Activity - Pair Review of Your Policy - Slide 11

Review your partner's policy against the eight criteria, then note the feedback and discussion about your own policy.

Criterion	Review of your peer's policy	Feedback/discussion about your own policy
Commitment & vision		
How developed & reviewed		
Aims & outcomes by year group		
Implementation		
Monitoring, review & evaluation		
Partnerships / SLAs		
Business links		
Approval signatures		

Strategic Alignment · Follow the Line · Slide 12

Use your own setting, or the Ridgeway case study, to test the line between organisational priorities and learner outcomes.

Element	What does it currently say / show?	Is it aligned?	What needs review?
Organisation priorities			
Learner need & evidence			
Policy commitments			
Strategic priorities			
Programme & resources			
Measures of success			

Where is the weakest link in the line of sight – and why?

Advising SLT · Make the Decision Easy to See · Slide 14

Use a real issue from your setting and prepare a concise recommendation.

Evidence	Issue	Recommendation	Resource / risk	Learner benefit	Decision required

What would governors need to know that may differ from operational SLT?

Strategic Partnership Review · Slide 15

Choose one internal or external partnership and review it using the strategic partnership lens.

Shared purpose	Contribution	Roles	Governance / accountability	Evidence	Review / exit

What is the main risk to sustainability, quality or inclusion?

What one change would strengthen the partnership?

Case Study Carousel · Three Different Partnerships · Slide 16

A. Curriculum leader supports careers but resists allocating curriculum time.

Shared purpose	Contribution	Accountability gap	Main risk	Proportionate governance	Evidence of success

B. Local employer is popular with learners but repeatedly cancels at short notice.

Shared purpose	Contribution	Accountability gap	Main risk	Proportionate governance	Evidence of success

C. Careers Leader, SENDCo and external adviser support vulnerable learners but referrals, information-sharing and follow-up are inconsistent.

Shared purpose	Contribution	Accountability gap	Main risk	Proportionate governance	Evidence of success

Before You Commission · Define the Requirement · Slide 19

Use a service you currently commission, may commission, or the personal guidance example.

NEED	OUTCOME	SPECIFICATION	QUALITY	BUDGET	MARKET

Which requirements are non-negotiable / pass-fail?

Which criteria could be weighted when comparing providers?

Writing a Useful Specification · Slide 21

Area	Requirement
Purpose & outcomes	
Learners & volume	
Competence & quality	
Inclusion & safeguarding	
Reporting	
Review / escalation / exit	

Case Study · Choosing a Guidance Provider · Slide 22

A school needs additional personal guidance for Years 11 and 13. Provider A is cheapest and uses Level 6 advisers but has limited SEND experience and basic reporting. Provider B costs more, uses Level 6 advisers including a SEND specialist and provides strong QA/reporting, but has limited capacity at peak times. Provider C has the largest capacity and a strong digital platform but uses advisers with mixed qualification levels. The school has a modest budget and a significant SEND cohort.

Criterion	Pass / fail?	Weight / importance	Evidence to verify	Provider implications

Which provider(s) would you shortlist – and why?

Preparing to Negotiate · Slide 23-24

Use the negotiation case study or a real agreement you need to reach.

Interests	Ideal	Must-have	Trade-offs	Red lines	Fallback

What might the other party value?

What could you ask for in return?

Monitoring an Agreement · Slide 26

Plan how you would monitor a commissioned service or strategic partnership.

Measure	What will be monitored?	Evidence / data	Frequency	Who reviews?	Action if below standard
Inputs					
Outputs					
Quality					
Outcomes					
Equity					
Value					

What would trigger improvement action, escalation, renewal or exit?

Capstone · What Would You Recommend to SLT? · Slide 27

A new headteacher asks for three priorities for careers. Programme activity is high but progression is inconsistent; SEND participation in employer activity is lower; staff confidence is mixed; employer engagement depends on two personal contacts; the external guidance agreement expires in six months; learner feedback is mainly satisfaction-based; and the careers policy has not been reviewed for three years. There is no expectation of significant additional budget.

Strategic priority	Evidence / rationale	Expected learner benefit	Resource / partnership implication	Decision required from SLT	How impact will be evidenced

Your Strategic Careers Plan · Slide 29

Start from where you are: create, review or strengthen your strategic careers plan. Use the CEC approach to move from evidence and diagnosis to priorities, objectives, actions and measures.

1. REVIEW & DIAGNOSE	2. SET PRIORITIES	3. PLAN FOR IMPACT
Review current / inherited plan Evidence & stakeholder voice SOAR analysis	Agree 3–5 strategic priorities Align with institutional priorities Consider learner knowledge, skills & behaviours	Set SMART strategic objectives Define outcomes, actions & responsibility Agree milestones & measures of success

My priority to take forward:

Strategic objective	Actions	Who is responsible?	Milestones	Measures of success

Group Discussion - How Does Your Strategic Plan Compare? - Slide 30

In groups, discuss the status of your existing strategic plan.

COMPARE WITH THE MODEL

How does your plan compare with the model outlined?

STRUCTURE

Does it contain strategic priorities, objectives and milestones?

EVIDENCE

Is it evidence-based?

FUTURE IMPROVEMENT

How could it be improved in the future?

Be ready to share your key points with the wider group.

Professional Standards · The Test Beneath the Strategy · Slide 31

Reflect on one strategic decision from today.

Ethical?	Inclusive?	Impartial?	Evidence-informed?	Accountable?

Where did professional judgement matter most?

Final Reflection

What is the most important thing you will take from the Extension Programme?

What will you do differently in your organisation?

What support or decision do you need from others?