

## 1. Introduction

The purpose of this paper is to provide an overview of the CDI's activities in the fourth year of operation from April 2016 to the end of March 2017.

## 2. Background

Since our launch in April 2013, the CDI has set an ambitious plan for growth both in terms of its membership and reach, speaking with one voice on behalf of the career development sector throughout the UK.

The CDI has a clear role to play in influencing UK Skills Policy as it affects those with whom career development practitioners work and a clear purpose to improve and assure the quality and availability of career development opportunities for all throughout the UK.

Throughout 2016-17 we continued to grow our membership to 5,017 by the end of March 2017 and achieved the key objectives of our business plan, including:

- A strong and recognised brand supported by an evolving website [www.thecdi.net](http://www.thecdi.net); social media (Twitter, Facebook and LinkedIn) presence;
- An impressive schedule of *free* webinars for members; events and conferences based on a training needs analysis of members;
- A growing political presence with the CDI being recognised as the *expert voice* in the field; advising civil servants and politicians; speaking at conferences and commenting on policy;
- A strong professional development plan promoting the *CDI Year of Professionalism*; creating the new *Registered Professional* category of membership and launching the new *Qualification in Career Development (QCD)*;
- Establishing the CDI Academy as an OCR Assessment Centre offering certificated courses;
- Eight best practice Awards presented as part of the UK Career Development Awards at an Awards Dinner in Leeds in March 2017;
- Appointing our first apprentice to cover membership and events admin;
- Business development success delivering major contracts including the staff room area in the Skills Show at the NEC; the National Career Guidance Show events and TeachFirst;
- Establishing a Finance Sub-Committee of the Board, meeting monthly;
- Developing strategic relationships with new organisations including AGCAS; the DWP; CIPD; Ofsted and the Careers & Enterprise Company in England;
- New publications: *Careers Professionals in the 21<sup>st</sup> Century: A Blueprint for Professional Roles in the Career Development Sector* (December 2016); *CDI Briefing: Careers Leaders in Schools* (January 2017); *Quality in Careers Standard and the Certificate in Careers Leadership* (February 2017);
- Re launch of the jobs board and new branding as *Careers in Careers*;
- Introduction of new Retired membership category.

The sections below provide more detail on major activities.

## 3. Financial Position

Financially 2015-16 was a tough year for the CDI: trading was disappointing in challenging conditions and the company accounts showed a loss of £78,741.00 at March 31<sup>st</sup>, 2016.

This situation clearly influenced our business plan for 2016-17: the focus was on cutting direct costs and not undertaking any new activities that would significantly add to our cost base. It also meant that the staffing budget was frozen although with government financial support in September 2016, we were able to appoint our first apprentice, Ronaldo Hare, to cover membership and events admin.

With the careers market continuing to function in austerity mode, despite some progress towards a new Careers Strategy in England under the leadership of Minister Robert Halfon, the CDI knuckled down to do what it does best: providing relevant CPD for members, supporting our QCG/D students and being the voice of the sector on career education and guidance. Our business plan was sensible and a pragmatic response to our financial circumstances.

Taking an overview, while our actual income was down on the previous year (membership increased but other commercial income declined); we did a fantastic job on reducing expenditure, so by March 2016 our accounts showed a net profit position of £16,559.00.

For any company to achieve such a turnaround in one year of trading is commendable and could not have been achieved without the support of the CDI staff and our volunteer members on Council, PSC and the Board. We made significant savings on some key budgets including travel; governance; financial services; office infrastructure and postage. Working virtually and holding meetings online undoubtedly contributed to our cost savings.

#### 4. Membership

At the end of March 2017, the CDI had a membership just over 5,000 individuals and affiliate organisations.

Membership fees were held at 2015-16 levels, offering great value for money. In 2016-17 we introduced two new membership categories: 1) Registered Professional – an opportunity for an individual to join the CDI and Professional Register at the same time 2) Retired member. By the end of March 2017, we had attracted 73 new Registered Professional members and 12 Retired members. We anticipate that these categories will continue to be popular.

Our bulk membership scheme enables employers to pay for the membership of their staff on a single invoice at a preferential rate. We are delighted that Careers Wales, Skills Development Scotland and the Careers Service in NI, paid the membership subscriptions of their staff in this way, as do many large employers in England. The total value of bulk memberships to the CDI in this year is £143,500.

Our investment in a new online membership database called Memberbase in November 2015 was the right decision, however the amount of time it has taken to cleanse the database and get all the records up to date has been significant and will result in a reduction in membership numbers in 2017-18 as duplicate and old records are deleted.

#### 5. Professional Development

In addition to continuing to grow the Register, we have delivered on many complex professional development projects. Claire Johnson, our Professional Development Manager (PDM) leads on these activities and her knowledge, experience and focus are hugely valued by the CDI.

1. **Qualification in Career Development (QCD):** Based on the *Blueprint for Professional Roles in the Career Development Sector*, new QCD Centres at Derby University and CCCU (London base) started delivery of this qualification in January 2017. The remaining five universities/QCG/D centres including two in Scotland will deliver the QCD from September 2017.

The QCD Moderator Team continues to visit all centres twice a year and the CDI delivered two Student Conferences, in November 2016 at Napier University and in March 2017 at Coventry University. Both were attended by over 60 students.

2. **CDI Academy:** In anticipation of the Careers Strategy and Statutory Guidance and the need to support the CPD of Careers Leaders/Co-ordinators, the CDI gained approval from OCR in February 2017 to deliver the QCF Level 6 Diploma in Career Guidance and Development. Three units from this form the CDI L6 Certificate in Careers Leadership which will be offered in Birmingham, London and Manchester and locally if required during the forthcoming year. As the Gatsby Benchmarks and Quality in Careers Award gain in significance in schools we have produced a document which shows how achievement of the CDI Certificate in Careers Leadership can contribute to these.

The CDI can also offer the CDI L6 Certificate in Career Guidance Theory which holders of the pre-2011 NVQ 4 in Advice and Guidance or LDSS require to join the UK Register of Career Development Professionals.

3. **Apprenticeships – Scotland:** Following CDI development of the SVQ Enabling Clients to Access Career Development Services SCQF Level 7 and the SVQ Career Information, Advice and Employability Support at SCQF Level 9 and the Modern and Technical Apprenticeships in Career Development, 26 people began the MA and TA in October 2016. Three people have now completed the MA and the remaining apprentices are making excellent progress. The CDI is managing the delivery of these apprenticeships.
4. **Apprenticeships – England:** The CDI, with assistance from Dr Michelle Stewart, is supporting a group of employers to develop the Higher Apprenticeship Standard: Career Development Professional. The proposal to develop the Standard was approved by the Institute of Apprenticeships in March 2017 and development of the Standard incorporating Level 6 and above qualifications in career development and the End Point Assessment is underway with an anticipated launch date of September 2018.
5. **CPD resources area of the website:** – this area of the website has been further developed so that as well as information on on-line materials, publications and training and events members can access: guides to online learning and accessing research; A-Z of CPD activities; *Career Matters*; *NICEC Journal* and CDI webinar recordings. In November 2016 Dr Lyn Barham began producing Monthly CPD Newsletters which provide ideas for CPD activities for specific topics.
6. **CPD Recording:** A requirement of professional registration is the undertaking of 25 hours CPD per year which is monitored by the PDM. In response to member feedback the CPD recording area of the website has been streamlined and this has proved a positive move with users.
7. **Mentoring Pilot:** Following a survey of members, the PDM and a sub group of the Professional Standards Committee is developing a process for providing four, free mentoring sessions for CDI members. A small-scale pilot for 30 mentors and mentees will begin in June 2017 with CDI provided training for the mentors. The pilot itself begins in September 2017.
8. **Career Guidance Observation:** In January 2017 PSC members began work on the process and documentation for interview observation to support the development of self-employed Careers Advisers in schools and colleges.
9. **Ethical Practice Case Studies:** Throughout the year PSC members have continued to produce Ethical Practice Case Studies covering the 12 principles from the CDI Code of Ethics. These also include a Case Study on Fundamental British Values and the Prevent Agenda. QCG/D centres find these of particular value when covering the Code of Ethics with students.
10. **UK Register of Career Development Professionals** – Our business plan target was to increase the number of registrants to 1500 by the end of March 2017; the actual number was 1249. Promotional work including an Employer Briefing on the benefits of employing staff who are on the Register will take place in the forthcoming year.

## 6. Events – Training and Conferences

The CDI prides itself on offering a rich and varied programme of CPD; traditional training events, conferences and webinars at a value for money price, which has not increased since 2015. Our events programme generates significant income for the CDI, attracting a relatively high number of non-members. All delegates receive a CPD certificate.

Our core CPD programme comprises four main elements:

- **Skills based training:** including Practical Guidance Skills (2 days); Advanced Career Guidance and Coaching Skills; Career Coaching Essentials
- **Information courses:** Insight into LMI; Social Media for Beginners; Embedding Social Media in Career Education and Guidance
- **Career education courses:** An Introduction to Careers Work in Schools; Managing Careers Information
- **Webinars:** Varied programme of general interest and higher education focused webinars.

In 2016-17 we tightened up our events admin processes and focused on providing the skills training which our members want. We were also successful in selling our trainers to other organisations. These approaches resulted in a significant increase in income on the previous year.

Income from events 2015-16 £55,818	Income from events 2016-17 £70,070
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2016-17

• 20 geographical events	• 300 delegates
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Working with NICEC we are delighted to be able to continue to offer two *free* 'Cutting Edge – Research into Practice' CPD days each year. These days are thoroughly appreciated by members because they offer innovative and practical programmes presented by expert speakers and a great opportunity to network. In 2016-17 these CPD days took place in Oxford in October (40 delegates) and Cardiff in February (35 delegates).

Fitting in with our strategy to drive more business through our website, we were able to offer a varied programme of professionally presented webinars as part of our member benefits package. We are grateful that most of our expert presenters give of their time free of charge. Additionally, we have chosen to partner with Inspiring Futures on a new series of general information and higher education related webinars.

2016-17

• 31 webinars	• 776 delegates
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**CPD programme in Scotland and Wales** – This year we established new member-focused CPD programmes in Wales and Scotland, which took the form of early evening CPD meetings. While these were well received by small groups of members, the geography of the regions and timing meant that many people who were interested were unable to take part. In 2017 we aim to extend this idea using webinar technology.

**Annual Conference** - Having taken soundings from the membership and suppliers in March/April 2016, we decided not to organise an Annual Conference event in the autumn of 2016. On paper the costs appeared to outweigh the benefits and the feeling was that members would not book in sufficient numbers to make this a viable event. An annual conference will take place in December 2017.

**The UK Career Development Awards (UKCDA)** were presented on March 7<sup>th</sup>, 2016 at a special black-tie Awards Dinner at the Hilton Hotel Leeds. The event was sponsored by our great friends and supporters,

The RAF and the Awards were presented by Sir John Holman, well-known for the Gatsby Report and work of the Gatsby Foundation. The UKCDA are firmly embedded as one of the CDI's showcase events and provide a truly sparkling occasion to celebrate excellence and achievement in the career development sector. One of the most memorable presentations of the night was the Rodney Cox Lifetime Achievement Award, presented to Dr Bill Law, by the Chief Executive Jan Ellis. Sadly, Bill died a few weeks later.

**Other major conferences** – Each year we work with partners to present national events, eg *The National Career Guidance Shows* in Leeds, London, and Leicester (with Prospects) and *Skills Show* at the NEC with World Skills. Members of the CDI, including the President, Virginia Isaac and Chief Executive, Jan Ellis, are also frequently invited to talk at conferences.

## 7. Website and *Careers in Careers Jobs Board*

The CDI website is one of our major communication tools and in line with our aim to drive more activity through the website, we worked with the developers to increase the functionality and introduce a new single-sign on approach in 2016.

Our website stats tell us that *each month* we achieve an average of almost 9,000 unique users, visiting a total of 47,982 pages between them (meaning each person visited an average of 5.5 pages before leaving the site). The three most popular pages are:

1. Home page (7819 hits)
2. Training and events page (3109 hits)
3. *Careers in Careers*/search page (2921 hits)

Desktop computers were far and above the highest route of access onto our website, although around 20% of people visited via mobile. We need to keep a watch on this method of viewing the website and invest in optimising it for mobile device use next year if budget allows.

The statistics also tell us that London accounts for the most number of visits (*in this case, sessions. A single session is when one user accesses several pages*), with other cities including Cardiff and Edinburgh on the list.

The *Careers in Careers Jobs Board* rebranding took place in March 2017. The statistics below evidence that the advertised jobs market was very similar to the previous year. However, our reach has extended to 184 different registered employers and 969 registered job seekers.

2016-17 we projected an income yield of £35,000 and achieved £28,890 (82.5% of the budget projection). We anticipate that the market will improve following the launch of the new Careers Strategy in England. Anecdotally we know that there is a growing shortage of qualified careers advisers throughout the UK.

	2015-16	2016-17
Number of job vacancies advertised	180	185
Job views	60,256	68,852
Registered employers	112	184
Registered job seekers signed up to the site	565	969

## 8. Member Communications

*Career Matters* magazine continues to be our flagship publication, ably edited by Alison Dixon, with four issues mailed direct to members annually. The magazine is also attractive to suppliers and 75% of the cost of design, production and posting are met by advertising. Back copies can now be accessed through the members' area of the website together with the NICEC Journal, previously mailed as hard copy; saving the CDI the cost of printing and postage.

**News by Email**, circulated each fortnight to all members, is regarded by members as one of the major benefits of membership.

**Other publications** – With a focus on the developing Careers Strategy in England we published our first Briefing Paper: *Careers Leadership in Schools* (January 2016). This was circulated to all members as an insert in the *Careers Matters* magazine and promoted with a press release.

We have updated all our membership materials and the Register booklet this year but avoided printing large numbers of copies and wide scale mailing to schools, choosing to invest in more economical small digital print runs.

## 9. **Networking, Lobbying and Communications**

A primary role of the CDI is to share information and provide networking opportunities for members, which we do in many ways through meetings; vibrant online forums including our own LinkedIn groups and specialist Communities of Interest (Career Education; HE Advisers; Independent Practitioners; Career Development Research; SEND and each Home Nation.)

Building partnerships and lobbying on behalf of members are important aspects of networking and communications which the President, Professional Development Manager and CE are actively engaged in on a daily basis. We promote information on major meetings and initiatives through the News by Email service, press releases and *Career Matters*. During 2016-17 we developed good working relationships with the employer body Careers England; Careers Wales and Skills Development Scotland.

Links with civil servants and government agencies are important and in 2016-17, the CDI regularly attended meetings of the Wales Strategic Forum for Careers Development and met with civil servants in the growing DfE Careers Unit, and the Careers & Enterprise Company. In March 2017 the CDI entered a new strategic partnership with the Careers & Enterprise Company, which amongst other things ensures that we regularly keep each other appraised of developments and national activities through six-weekly conference calls.

The Chief Executive also sits on several key advisory and steering groups including the board of the Quality in Careers Standard; Gatsby National Pilot and Compass Advisory Group.

It is important to acknowledge the work of our Policy Associate, David Andrews and Project Associate (Scotland), Vivienne Brown, who stood down from this role in December 2016. On limited-time contracts of two days per month, they have achieved a huge amount in promoting the reach of the CDI and coordinating our responses to government policy and proposals. Their hard work and insights have been invaluable in helping us to position the CDI in the minds of major stakeholders and government departments. In 2017 we intend to create two new Project Associate roles for Scotland and Wales.

## 10. **Staff and Infrastructure**

Although it was our ambition to increase the staff to better spread the workload and provide a higher level of customer service to members, our budget position precluded real growth. In September 2016 we appointed our first apprentice and Ronaldo has now completed his training and joined us as a full-time member of the team, focusing on events admin and membership enquiries.

Jo Palmer our finance assistant left us for a high-level PA role in March 2017 and has been replaced by Tanya Rushton who has really proved her worth in chasing outstanding payments in 2017. All other staff have been with us since the CDI was first established, although they now operate in two distinct teams: finance led by Sarah Garratt and membership led by Dan Hope.

Part way through this financial year we changed accountants and now use the services of a large West Midlands accountancy practice, Baldwins, which has offices in the same building as the CDI in Stourbridge. This relationship is working well and is significantly cheaper than our previous arrangements. Having

taken over part way through the year, Baldwins have helped Sarah to move onto Sage accounts and produced the CDI's final accounts for 2016-17.

## 11. Summary

True to the original vision for the CDI, everything we say and do contributes to:

- Building the credibility of the CDI
- Ensuring its long-term viability
- Promoting the importance of career development services provided by highly qualified and trained professionals
- Developing the career development sector

This report outlines our achievements in our fourth year, which has been both rewarding in its successes and quite tough financially, as we worked hard to reduce our costs. Ongoing economic austerity, the lack of government investment in CEIAG, particularly in England and Wales and an outstanding pension liability, have stretched our resources and committed, loyal and hardworking staff. Looking ahead to 2017-18, we will need to create a realistic budget and reduce our costs still further if we are to avoid increasing membership fees, which account for over 45% of our income.

I hope that you will agree that as a relatively new UK-wide professional body, representing a diverse membership, we have come a long way in a short period of time. Importantly, this year we have strengthened our financial position and membership offer; launched the CDI Academy and mentoring pilot adding value to our strong professional development strand, and continue to speak with a clear and authoritative voice on behalf of the career development sector.

**Jan Ellis, Chief Executive**