



INFORMATION, ADVICE AND GUIDANCE POLICY

2021-22



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Introduction

Surrey Adult Learning (SAL) aims to offer learners the best quality service possible and is committed to providing impartial and objective information and advice on learning opportunities and courses to help learners make the best possible choices and to gain the best possible outcomes from their learning.

This policy should be read in conjunction with other Service and County policies and procedures including quality assurance, appraisal, equality, diversity & inclusion and data protection.

Learners remain our focus and we continuously seek to develop all learners, both academically and socially, so that they are well positioned to maximise their life opportunities. We will provide learners with an honest appraisal of the degree to which we can help them or refer learners to another service or agency that can provide more appropriate assistance.

SAL's Strategic priorities for 2021-2022 state the following:

Work with partners to widen access to relevant, accessible and impartial careers and training information to assist existing and potential learners in achieving their aspirations, learning and career goals. Target: Ensure successful matrix assessment in February 2022.

A balanced programme is delivered through Community Learning. This includes both targeted courses and a broad universal offer. There are seven dedicated adult learning centres in North and South West Surrey. These are supplemented by a set of community venues, including schools and early years providers, to meet the needs of learners who otherwise would not engage with the programme.

There are four teams focused on delivering targeted services - one to meet the learning needs of adults with learning disabilities; a second that delivers a Family Learning programme across the whole of the county; and the third works in the areas of relative disadvantage providing Outreach learning opportunities to adults least likely to participate, including people on low incomes with low skills/ESOL. Since the Covid-19 pandemic this team has introduced a range of non-accredited employability skills courses designed to increase learner confidence and build the skills needed to get a job. The fourth is the Passport to Wellbeing provision for those with low to medium mental health issues.

Through the Adult Skills Budget funding we offer a set of GCSE maths and English courses. There are planned progression pathways through stepping stones and functional skills courses which are offered to those not yet ready to study at GCSE level. Accredited ESOL courses are also offered. In addition, a set of qualification-based courses are included for adults with learning disabilities. We also offer Gateway Essential Digital Skills qualification at E3 and L1 to support those looking to retrain or progress at work post Covid-19 by improving their essential digital skills.

The apprenticeship provision offers apprenticeships primarily for Surrey County Council employees and focuses predominantly on office-based vocations to support the career aspirations and employment prospects of staff.

Information and advice may be:

- Before entry to learning – choosing a programme that is most suited in terms of location, content, level, delivery style, costs, qualification, entry requirements, support available, etc.
- At induction – key information and advice related to programme, learning contract, options for course change if required, complaints procedure, safeguarding etc.

- On programme – advice on learner support available, possible progression/employment routes, etc.
- On exit – further learning or employment opportunities, etc.
- At any time – referral to another organisation, (including through an online service) for advice on careers, work and learning that may be outside the scope of SAL.

To ensure that services are accessible to all and of good quality, SAL will:

- Develop, disseminate and annually review aims, objectives, procedures and performance indicators linked to the Education Inspection Framework (EIF) and the **matrix Standards**.
- Provide staff opportunities for training to ensure understanding of:
 - Policy, aims, objectives, procedures and performance indicators.
 - Equality, Diversity & Inclusion
 - Safeguarding and Prevent
 - Confidentiality issues.
 - Learner support.
 - Referral systems (internal and external).
 - Customer care.

Aims

SAL aims to support learners to make informed choices by providing information and advice that is:

Impartial:

We won't only look at courses offered by SAL. We will help learners look at what other providers are offering. They will be told how to find out more – perhaps given a phone number or website address.

Confidential:

Nothing from the discussion will be shared with anyone else without the learner's knowledge or permission. High regard is given to the General Data Protection Regulation 2018.

Fair:

Learners will be treated fairly and equally. If they have a disability, reasonable adjustment will be made. If their culture or religion means that they need special arrangements, these will be made wherever possible.

Transparent:

Learners will be told what will happen. If, at any time, learners do not understand what is going on, they will be encouraged to ask the adviser to explain.

Accessible:

We will do all we can to help learners access our service and support them in using it. If they have any concerns or worries about being able to use our service, they will be encouraged to let us know.

Diverse:

The range of our services will reflect the diversity of learners' needs and the Service's contractual obligations with the Education & Skills Funding Agency.

Objectives

We will:

- Operate within the **matrix Standard** and Education Inspection Framework (EIF).
- Establish effective communication with learners.
- Ensure effective communication with learners to provide relevant information enabling them to make appropriate choices.
- Provide access to curriculum specialist information and advice both pre-course, on-course and at exit (to support progression to other provision). Advice is available, for example, from trained customer services staff, curriculum staff, tutors and managers.
- Build and maintain effective networks and partnerships.
- Maintain and improve information materials.
- Refer customers to other providers if they need Information, Advice and Guidance (IAG) that is outside the limitations of the service available from SAL. An online careers service option is available to all learners.

IAG Delivery

Information on courses is provided by centre staff, curriculum staff, the website and the Customer Service Team. Where SAL does not have the information requested, the individual will be provided with the name and contact details of the National Careers Service (NCS).

Advice provided is impartial and confidential, to enable learners and potential learners to make informed choices as to the most appropriate route for their personal and career development. Information and advice are provided by the curriculum and customer service teams or, in the event that SAL is unable to provide the relevant advice, the individual will be signposted to the NCS.

Guidance can only be provided by fully trained competent staff, and potential and current learners can be signposted to the NCS to see an advisor face-to-face, by telephone or in written format.

Surrey Adult Learning works collaboratively with the NCS to enhance its curriculum offer to learners. SAL is committed to developing quality IAG provision in agreement with its partners, to ensure that the best range of progression opportunities are available, and that consistency of delivery ensures all learners receive impartial, high quality IAG.

SAL promotes and supports equality of opportunity and wherever possible will seek to provide information in a format which suits the needs of the individual.

Limitations

SAL is committed to providing high quality IAG but recognises its own limitations and refers all enquirers to other agencies within the quality network, when required IAG cannot be provided directly by SAL.

We will ensure that all staff are aware of their own role and limitations and know when to refer learners.

We are unable to provide information on areas other than education and training opportunities.

Confidentiality

Confidentiality and security in the holding of personal data will be carried out in line with Surrey County Council's Data Protection Policy and GDPR.

This will include:

- Offering confidential enrolment facilities.
- Use of passwords on electronic systems.
- Secure storage of confidential material (limited access under lock and key).

Equality, Diversity & Inclusion

Our commitment to equality...

...is not about treating everyone the same, but recognising and respecting differences and treating each other with fairness and dignity.

SAL aims to support customers to make informed choices by ensuring that IAG given is:

- Impartial
- Confidential
- Fair
- Transparent
- Accessible
- Diverse

Monitoring and Evaluation

Systematic review will take place through our quality processes and self-assessment.

Covid -19

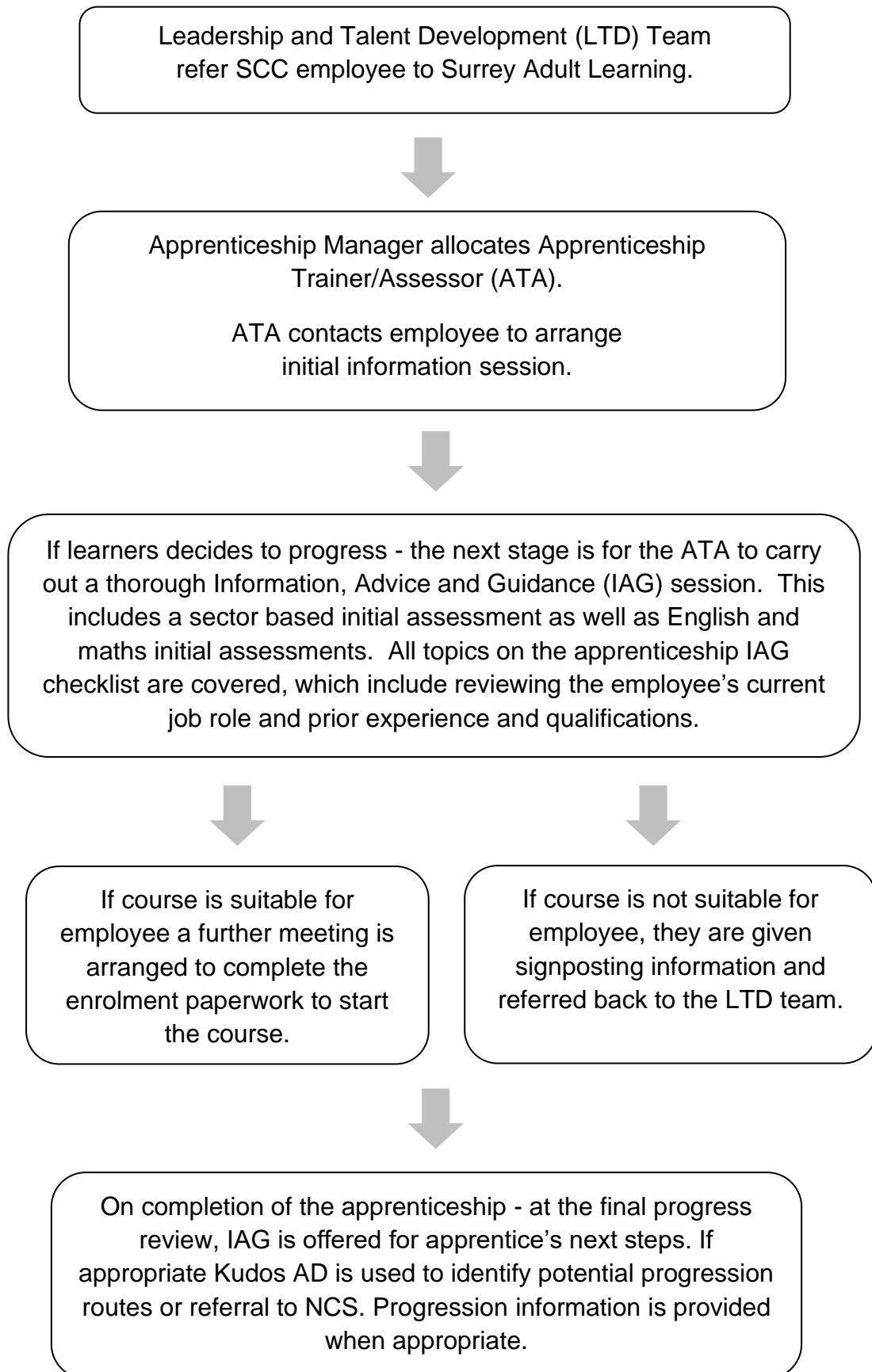
SAL continues to offer both online/digital and face to face opportunities to ensure learners receive the best quality service possible and is committed to providing impartial and objective information and advice on learning opportunities and courses to help learners make the best possible choices and to gain the best possible outcomes from their learning.

Learners remain our focus and we continuously seek to develop all learners both academically and socially so that they are well positioned to maximise their life opportunities.

Please refer to the appendices for individual area IAG processes.

Appendices – Curriculum Area IAG processes

Apprenticeships



Customer Service Team

Phone call or email comes into the Customer Service Team (CST).



Where possible the team will assist the learner with their query or book them on to an IAG session for further information if the course requires one. Where this is not possible the team will look for assistance.



If the subject area is in the programme, information from the enquiry is passed to the relevant AsCM.

Where the query regards a subject we do not offer, the CST will direct the learner to the National Careers Service.

<https://nationalcareers.service.gov.uk>

0800 100 900 to speak to an advisor



If the AsCM is unable to help the learner, they will signpost the learner to the NCS as above.

ESOL IAG Process for 2021-22 Intake

1. Applicant enquiring about the course completes MS Form on website giving initial information.



2. Applicant receives automated email acknowledgement, saying that they will receive another email within 10 working days.



3. Every morning Adult Skills add Applicant's name, details, course and date of enquiry on spreadsheet and emails eligible Applicant the ESOL assessment.



4. Applicant returns assessment to Adult Skills who save to folder on I Drive and log date of this action on shared spreadsheet.



5. AsCM reviews assessment, enters result on tracker and notifies Adult Skills of course offer.



6. Adult Skills send email to Applicant offering available courses at correct level and 2nd MS Form is sent to capture outstanding details needed for enrolment OR details signposting elsewhere and log date of offer/signposting on spreadsheet.



7. Applicant emails Adult Skills accepting/declining place on course and Adult Skills log on spreadsheet and enrol Applicant on course on EBS.

FS and GCSE English & Maths IAG Process for 2021-22 Intake

1. Applicant completes MS Form enquiring about the course.



2. Applicant receives automatic acknowledgement email saying that they will receive another email within 10 working days.



3. Every morning Adult Skills put Applicant's name, details, desired course, and date of enquiry on spreadsheet.



4. AsCM/CM sets up BKSB login & password for Applicant and enter on the shared spreadsheet, CM checks prior learning.



5. Adult Skills send covering email with BKSB login details, BKSB login information, and a request for Applicant to complete a short Motivational



6. Applicant completes BKSB IA and emails Adult Skills their Motivational Statement and free writing assessment for English.



7. Adult Skills save Applicant's Motivational Statement and Free Writing Assessment into shared folder on I-Drive, and log date of this action on shared spreadsheet.



8. Lead Tutor/AsCM/CM reviews Motivational Writing/free writing assessment and BKSB result and logs decision and BKSB result on tracker and Adult Skills notified of course offer.



9. Adult Skills send an email to Applicant, offering them available courses and 2nd MS Forms to capture outstanding details needed for enrolment OR details signposting elsewhere and log date of offer/signposting on spreadsheet.



10. Applicant emails Adult Skills accepting / declining a place on a course. Adult Skills log information on spreadsheet, enrol Applicant on course and send out Pre-Course Tasks.

Passport to Wellbeing courses (PWB)

Courses advertised on SAL website, through partners and additional campaign activity. Flyers to promote specific courses are produced periodically and distributed to partner organisations as part of wider partner engagement efforts.

Initial enquiries are dealt with by CST providing information about the PWB programme and details of the types of courses available, details of scheduled courses with available places.

Where a suitable course has available places learner is enrolled subject to IAG taking place, IAG appointment is booked, (ensuring the 'mental health difficulty' box is ticked on the enrolment) and learner is sent an IAG confirmation email.

OR

If no suitable places on learner's preferred course, learner is enrolled onto a course waiting list. Confirmed enrolment will be subject to availability of places and IAG taking place. When places become available, the AsCM will invite learners to IAG.

OR

Where appropriate, enquiries from organisations or any less straightforward cases are referred to AsCM.

AsCM meets learner for IAG.
(If learner does not attend, AsCM sends request to CST to withdraw the enrolment.)

AsCM meets learner for IAG, learner completes a combined questionnaire / additional needs disclosure form, terms & conditions and Community Connections leaflet are provided. The questionnaire helps to determine the suitability of the PWB programme for the learner.

If PWB is suitable, AsCM confirms course details to the learner during the appointment.
If not appropriate, the learner is signposted elsewhere and the enrolment is cancelled.

The completed IAG questionnaire is saved by the AsCM in a limited access folder on OneDrive.
A copy is given to the tutor for information.

Learners are reminded of their entitlement to free places at course induction and mid-course and encouraged to consider their next steps. Towards the end of term, learners are asked to decide their plans for progression. Subject to eligibility learners will be enrolled on an appropriate course.

Learners are invited to complete a PWB wider outcomes questionnaire to provide (anonymous, if they wish) feedback on their progress.

Progression signposting is provided towards the end of their entitlement to free courses. If necessary, a further IAG appointment is made to assist learners in choosing their next course or signposting elsewhere.

Supported Learning (SL)

1. Information is sent to all LD learners via emailer (newsletter) and the SL group email regarding booking an IAG appointment with the relevant AsCM.



2. Learner contacts AsCM to book an IAG appointment. During the conversation, AsCM to:

1. Confirm if there are any changes to learner details or circumstances
2. Agree a suitable time to host the meeting via Zoom or phone
3. Remind applicant to provide payment details and any supporting documents i.e. proof of benefits during IAG appointment
4. Complete the IAG spreadsheet, with learner name and booking time ([I:\COML&C Serv\SAL\IAG\IAGs 2020-2021](#))



3. AsCM emails Zoom invitation to the learner for the IAG appointment (if being carried out by Zoom) and a BKSB assessment and Additional Needs Disclosure form, if required. Remind learner/Applicant to send documents prior to the appointment.



4. AsCM carries out an online or telephone IAG appointment with the Applicant, completing the spreadsheet for the relevant Centre saved here:

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All details regarding enrolment and payment to be collected at the time of IAG appointment. PLEASE NOTE: For any IAGs being held before 3 August, please inform the learner/carer that payment will be taken on, or after this date by CST.

AsCM to use the 'Comments' field to capture relevant information such as;

- *Learner requires Low Wage Form (this will then be sent with the confirmation email)*
- *Learner advised to scan a copy of benefits, as they did not have this available at appointment*



5. AsCMs to inform BDT of Journal Transfers / Invoices to process. BDT to update the relevant section on the IAG spreadsheet during each process and update EBS once payment has been received.



6. AsCM updates SL class list and files all documentation in the learner's folder on the SL I Drive.

Universal Programme

Learners are given pre-course information during enrolment and as part of pre- course IAGs when appropriate.



During induction, the tutor reaffirms the purpose of the course and its aims and objectives.



All learners' pre-existing skills and knowledge are assessed by the tutor and targets are set based on the results of the Initial assessment. Learner progress is recorded throughout the duration of the course.



During the course, the tutor responds to learner questions and provides responsive information related to the course and /or signposts to other sources of information as appropriate



At the end of the course tutors provide learners with signposting information, which includes National Careers Service information and links to the Surrey Adult Learning website/ Your Learning. KUDOS AD online licenses are offered when appropriate.

Work Skills & IT (Adult Skills)

Dates, times and locations of **AS** courses are advertised on the Surrey Adult Learning Website, radio, internal email and Social Media. Applicants are advised to contact CST or call in at their local Adult Learning centre.

CST/Centre to support Applicant through online **basic suitability assessment**, provided by Gateway Qualifications and then **add Applicant details and results to Teams spreadsheet**.

Learners complete this assessment by phone



Eligible



CST/Centre to book Applicant onto IAG session at appropriate centre or Zoom timetable, add details to tab on Teams spreadsheet, and notify AsCM via Teams message



Not eligible



Direct Applicant to universal, low cost, non-accredited, 'Build Your Skills & Confidence (HPT) stages 1–3 provision, via CST/Centre staff



With basic skills.



Without basic skills.



AsCM sets up BKSB login and password for Applicant adding details to Teams spreadsheet



Applicant attends IAG session at an appropriate centre or via Zoom and completes BKSB Diagnostic Assessment to find correct level of course



Skill level at E3 or L1

AsCM notifies CST to book applicant onto appropriate course



Skill level above L1

Direct Applicant to Universal, OR or PWB provision, via CST, depending on circumstances



Once learners have enrolled, diagnostic assessment results are merged on BKSB platform and passed on to appropriate tutor, to monitor progress and plan for differentiated learning.



At the end of the course signposting to the website next steps information is provided by the tutor. KUDOS AD online is offered when appropriate.

Family Learning & Outreach

Learners are given pre-course information as part of the online enrolment process.



Learners are sent the 'Welcome to Learning' information with the Zoom login.



During induction, the tutor reaffirms the purpose of the course and its aims and objectives. Tutors also check that learners have read and understood the information in the Welcome to Learning information.



All learners' pre-existing skills and knowledge are assessed by the tutor and targets are set based on the results of the Initial assessment. Learner progress is recorded throughout the duration of the course.



During the course, the tutor responds to learner questions and provides responsive information related to the course and /or signposts to other sources of information as appropriate.



At the end of the course tutors provide learners with signposting information, which includes National Careers Service information and links to the Surrey Adult Learning website/ Your Learning. KUDOS AD online licenses are offered when appropriate.

Supported Learning – Lip Reading and Managing Hearing Loss

The specialist tutors give information, advice and guidance on next steps to existing learners during the course. The Customer Service Team give information, advice and guidance with support from the Supported Learning curriculum team if needed to potential new learners. This may include signposting to alternative courses held in Surrey.