

# Handbook of Career Advice Skills

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**step**  
SKILLS TRAINING FOR EFFECTIVE PRACTICE

## **Handbook of Career Advice Skills**

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## About the STEP project

Disadvantage in the labour market is persistent and common across all EU member states. Disadvantaged groups do worse than others during recessions, and remain unemployed more at any time. Current approaches are often ineffective for individuals in need of help. The project ‘**Skills Training for Effective Practice**’ (*STEP Project No.: 2014-1-SK01-KA200-000489*), funded by the EU Erasmus+ Programme, has reviewed scientific evidence from around the world about the most effective methods of guidance for helping people choose and succeed in suitable careers.

The STEP project has created a curriculum to train counsellors, employment advisors and others working with disadvantaged groups, enabling them to apply the methods that research has shown to be effective. The curriculum has undergone controlled comparative testing in four countries, and has led to the publication of this Handbook of Career Advice Skills based on the project findings.

This publication summarises our view of the evidence in a way that readers will find accessible and applicable to work with disadvantaged groups and individuals. The Handbook aims to provide a comprehensive guide to evidence, content, delivery, modes of learning, skill assessment, validation and organisational support for the key skills for those offering career and employment advice to disadvantaged people.

This work has been conducted in partnership with the research team of STEP project partners and this work is freely available from the authors and partners of the STEP Project, who are:

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# Introduction

## **!** Thank you for your interest in STEP

STEP stands for ‘Skills Training for Effective Practice’. STEP is a collection of resources that can be used to construct training or skill-development activities for employment advisors. The resources and methods in STEP provide tested, effective and ethical ways to help disadvantaged people, and their employers, to attain and retain suitable work. The STEP programme is based on the good-quality evidence about ‘what works’ in employment advice.

This handbook is intended as a guide for those who are setting up a STEP Programme.

STEP was created by an international team who examined the world wide evidence for what works in employment counselling, distilled the results into a skills curriculum for advisors, trained trainers, and tested and evaluated the curriculum with 80 advisors in four countries. The result of this work is a curriculum that conforms to the current understanding of what effective career and employment counselling is, coupled with quality guidance on how to install and apply the curriculum.

Some features of STEP are:

- it applies to disadvantaged job seekers and their future or current employers;
- it conforms to scientific evidence about the active ingredients in successful employment advice;
- it can be adapted to different programmes, legislative and welfare environments;
- it can be implemented using e-learning in support of face to face teaching methods;
- it emphasises advisors’ skills;
- high value is placed on transfer of skills to working practices;
- high value is placed on employer involvement;
- high value is placed on observational assessment of skills.

## What we mean by ‘scientific evidence’, ‘what works’ and ‘effective skills’?

Looking for the ‘scientific evidence’ we gave highest priority to randomised controlled trials of employment advice projects and their methodologies. These tested the method used against ‘other methods’; the latter were usually either no action, or some pre-existing intervention. The evidence showed that the method under trial produced better results. We gave some weight to independent inferential studies (statistical analysis, systematic reviews and the like) and little to self-reports, policy statements and untested assertions about good practice. Our report of this review is available from project partners, and has been published in *Career Guidance in Theory and Practice* (in Slovak: *Kariérové poradenstvo v teórii a praxi*) and in the scientific monography: *Work-Personal Life: Between Harmony and Disintegration* (in Polish: *Szkoła – Zawód – Praca*, 2015).

By ‘what works’ we mean the activities, behaviours and organisation shown by the evidence to result in more clients getting work at higher rates of pay and for longer periods, than other methods.

By effective skills, we mean the thinking, planning, behaviour and interpersonal relationship skills shown by advisors when they:

- engage in ‘what works’ activities,
- or use closely related counselling techniques found in therapeutic and personal guidance settings and which have been shown by extensive randomised controlled trials to be efficacious.



# The STEP Programme

## What is a STEP Programme or Course?

A STEP Programme aims to help people who provide employment advice to use the most effective skills. At its simplest, a STEP Programme is a series or collection of demonstrations and practice sessions that enable advisors to watch and practice the skills that will enable them to help their clients. At its most complete, it is a carefully structured programme of activities that enable advisors to master the complex and diverse skills involved in helping others become able to manage their own 'life' in the labour market.

A STEP programme is more than a course curriculum. It is based on the available research evidence about activities, programmes and skills that result in clients becoming employed, staying in work longer, and earning more when they are employed. It is based on the belief that the client has a right both to be empowered to control their own future and also to make their own informed decisions. It recognises that the labour market is imperfect, a place of competition and complexity, in which today's information is out of date tomorrow, and therefore that involvement, employer contact, attention to detail and flexibility are important.

The STEP programme provides the raw materials and the processes for construction of skill courses or learning events that are adapted to the needs of the learners and their circumstances. It emphasises both learning procedures and quality measures as much as actual lesson plans. Using a STEP programme, trainers and educators will be able to create their own skill-training courses. They will be able to make them fit their needs, and the needs of the employment and careers services, making them effective for local people in their local labour market.

## What does a STEP Programme 'look like'?

STEP has several key elements which make it suitable to use in any career and employment services environment:

- an 'employer' of employment advisors is usually involved. That might be a Public Employment Service, school, university or training centre, a private contractor to government, a municipality or local authority, an NGO or charity, or an organisation that finds itself running employment programmes;
- learners practice their skills from the beginning, gradually building up to mastery of the subject;
- learners are challenged progressively, in an environment that offers encouragement and helpful feedback;
- wherever possible learning takes place at work as well as in the classroom and in solo and group study, practical experience and practice of skills are emphasised;
- visits and study of real jobs and real workplaces are included;
- the use of e-learning and IT systems may be used, but only where it contributes to the skill and understanding, not as a cheap substitute for more suitable methods;
- the evidence for 'what works' determines what is taught;
- fashionable and even seemingly authoritative methods, techniques and approaches are excluded, or at least treated critically, if they do not conform to the evidence and 'what works' principles;
- critical study and access to theory are encouraged, but form only a limited part of the curriculum, and are not the subject of assessment. The goal is for the learner to be aware of theory and evidence, and to be thoughtfully critical in their approach to new things;
- the learning leads to acquisition of behavioural abilities applied in a complex inter-personal setting;
- learners' progress and achievement is measured by their ability to do the right things in a real-life or life-like setting. Descriptions and dissertations are useful supporting material but do not replace actual practice. Neither attendance, level of other qualifications, nor job tenure are regarded as valid substitutes, though all can be relevant;
- while learners are expected to work diligently, they are not stressed to the point of reducing their capacity. Enjoyment of the learning experience is a valued contributor to success. Exam stress has no place in STEP.

## Goals of STEP

The goal of STEP training is to enhance advisors' skill in the provision of employment advice. This has three significant and meaningful outcomes:

- 1) it enhances a clients' own capacity<sup>1</sup> to make choices and act independently, and effectively, in their chosen labour market;
- 2) it supports clients' current, or future, employers through better equipped employees and strengthened relationship with the employment support service;
- 3) it improves the effectiveness of employment-support services, through outcomes 1 and 2.

We have numbered the outcomes one to three to emphasise that they are in priority order: the first outcome is the most important, and the second, also a subject of STEP activity, is intended to support the first. Likewise, the second having been achieved, the third becomes possible. The goal of enhanced effectiveness in employment services, though often expressed as the principal aim, is actually the consequence of the preceding activities.

The research behind the STEP approach shows that clients can make improvements in health and psychological wellbeing during well-run employment programmes. The inter-personal skills deployed in STEP have much in common with those applied in some therapies; but STEP is not about providing therapy. The goals of a STEP programme should not include clients':

- physical or mental therapy;
- psychological conditioning in response to clients' or advisors' mental state;
- social adjustment or integration;

though it is noted that change, improvement or worsening may occur as a side effect, and any notable worsening should lead to re-appraisal of the service being offered to the client.

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<sup>1</sup> Throughout the Handbook we use 'client' to refer to an individual who is receiving employment or career advice and service; 'advisor' to refer to the person giving the support and advice to the client, and 'service', 'service provider' or 'employment-support service' to refer to the organisation that employs the advisor.

## Using this Handbook

This handbook provides the information needed to construct a STEP programme that is suited to the needs of clients, in a specific local employment-advice setting and in a specific local training and accreditation framework. It does not do the work of designing a programme, but instead provides a design guide, including the contents, quality standards, sample procedures and a menu of exercises.

The handbook as a whole can appear daunting to anyone setting up a new training project; but our experience in practice has been that good results can be achieved with quite modest inputs. We do not expect every installation or example of STEP to be an onerous undertaking, nor do we want users to feel that they cannot begin what would be too difficult to finish. Significant additions and improvements to more traditional training methods can be had by following the basic principles (see for example Delivery of Training in the Quality Manual, and Learning Outcomes and Learning resources in the Installation Guide).

The Handbook and the Learning Objectives cannot be explicit about every nuance of the skills involved in offering employment advice. Such detail would lead to a massive tome, and there are other source texts, recommended for such detail.<sup>2</sup> In practice we think that a combination of fluency and confidence in the use of core skills, respect for clients and some understanding of theory are sufficient for learners to become effective and to go on to develop their proficiency through thoughtful in-work application.

To use this handbook, we suggest that:

- a new reader may browse through to become familiar with the concepts and broad headings;
- a programme designer bears in mind their resources of time, effort, people and funds while reading through the various sections to make initial choices about how they will build a course;
- during the course design stage, a Learning Needs Analysis and the Learning Objectives and Quality Assurance Factors should be foremost;
- as the main outlines of a design develop, the Quality Manual will help add detail to a learning strategy. It is strongly advised to read the Quality Manual in parallel with the Learning Objectives and Installation Manual during detailed planning.

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<sup>2</sup> For example, Miller, W. R., & Rollnick, S. (2012). *Motivational Interviewing, Third Edition: Helping People Change*. New York: Guilford Press; or McGill, I. & Beaty, L. (2002) *Action Learning, Second Edition*. Routledge Falmer. There are many more.

## Experience of STEP in the Project Trials

By 2017, the STEP Programme had been implemented and evaluated in Cyprus, Hungary, Poland and Slovakia. About 80 people participated as learners (advisors), coming from a range of backgrounds: some were new to employment advice, some experienced advisors, some in the NGO sector, some from public employment services. We asked for their estimates of their confidence to do their job before and after training, and found that:

- the STEP training increased confidence in 155 of 158 responses,
- the training increased confidence in both new and experienced advisors,
- the training increased confidence in both mixed groups and in groups from a single employment-support service.

We learned some important things from these trials, and have incorporated them in the Handbook. We learned that:

1. Fidelity to the curriculum is important. Course designers may be tempted to add or replace elements that do not conform to the curriculum. The temptation should be resisted! The curriculum has been designed to include what works and to exclude what is ineffective.
2. Responding to local services, laws, budgets, and practices, course designers can include necessary knowledge and service-procedures to the STEP, but additions must not alter the skills content. If there is a clear conflict between STEP and what is required either legally or by the service in which advisors work, STEP should prevail.
3. Transferring skills from training to the workplace calls for:
  - a. active support from the advisors' employer;
  - b. trainer liaison with the workplace including in-work learning, feedback, support and mentoring;
  - c. careful selection of goals concerning change in the behaviours of advisors at work;
  - d. co-operation in logistical and manpower issues: duration and timing of training, covering work absence, using personal time such as weekends, and more.
4. Trainers need time to prepare and to develop their own trainer skills in this new curriculum. Experienced trainers should not find this difficult, but only good preparation creates the required quality.
5. Trainers should be expert advisors. Their skill enables them to provide examples and feedback to ensure that learners acquire the right skill.
6. Demanding though it is, observation of skills in practice is the best way, by far, to evaluate individual learners and the impact of training. Proxy measures such as self-reporting, are useful but limited. Traditional end-of-course appreciation sheets offer little of value.

7. Comparative tests of training programmes provide valid reasoning for improvements, but need very close control and supervision if they are to provide significant results. Ideally they will be led by independent observers.
8. When comparative tests are not used, and lacking observation of skills, there is a risk that almost any intervention will be self-reported positively by learners and trainers. Such reporting should be evaluated very thoughtfully.

# Installation & Quality

The STEP Learning Units and Assessment Record may be found in the Learner Guide shown in Appendix 1.

## Programme and Course Installation

STEP stands for ‘Skills Training for Effective Practice’. It is a series of skill-development resources to enable employment advisors working with disadvantaged people to offer useful, effective and ethical help. This manual guides those who are setting in the necessary processes to set up a STEP Programme.

### The STEP Programme overview

A STEP Programme consists of a number of learning elements (procedures, content, methods, assessments and so on), and includes a definite learning style that supports the acquisition of skills for employment advisory occupations.

### Changing practice

The aim of a programme should be to apply newly-acquired skills and knowledge in everyday work, leading to:

- more effective service provision,
- more able and confident clients,
- reaching goals earlier and in fewer sessions,
- achieved through a trusting professional relationship and good quality communication with the client,
- advice sessions with detailed needs analysis, better solution-focus and problem exploration,
- more effective action-planning,
- better matching of people with work,
- use of the competencies that are in the curriculum,
- cooperation and keeping in touch with other organisations,
- development of relationships and networking with employers,
- application of the self-efficacy concept and practices.

We have used the term ‘Programme’ rather than ‘course’ or ‘qualification’ to emphasise that STEP can be adapted for use in a wide variety of settings.

## For newcomers to employment advice

These will usually be ‘generic’ STEP courses and assessments designed to prepare learners for jobs and professional activity in employment advice, providing them with the full range of skills and experience. Such arrangements will always:

- include the full curriculum unless the learners have been assessed by skill observation as already having certain skills,
- include real-life appreciation of labour market situations, employers and as far as possible with clients, ideally through work-experience placements or internship.

## For in-service training and skill development of advisors and careers staff

These could be employer-specific STEP courses to prepare new staff or to upgrade existing staff through in service training. These courses will always:

- use a Learning Needs Analysis to select learning objectives from among the full range,
- provide learners with opportunities to review the whole of their practice, and to study theoretical and ethical components in addition to other skill needs,
- include real-life appreciation of labour market situations, employers and as far as possible with clients, in order to make the needed adjustments to pre-existing practice,
- and may be taught during working hours

STEP programmes are equally valid in the public NGO or private sectors.

## Assessment-only programmes

These do not provide learning, but assess candidates to see whether or how much they reach the STEP Learning Objectives. They should:

- apply the STEP Assessment procedures rigorously,
  - provide encouraging and evidence-based feedback to candidates in support of their development and decision making about their own learning needs;
- and may
- assess a sub-set of the Learning Objectives in support of a Learning Needs Analysis or to support staff development programmes generally

The STEP Programme is based on evidence drawn from international studies and research into what is effective in employment counselling. Its focus is effective practice, and while it includes and values knowledge and theory as part of skill development, it does not aim to teach theoretical constructs in any depth, nor to provide the level of background reading and knowledge that would often be required for certain levels of qualification. The aim is to help people become skilful, effective



and critical practitioners. STEP can be offered as a stand-alone programme as a whole or in modular units. It may also be embedded within wider educational or professional provision, provided that the quality criteria for STEP are not diluted. These quality criteria govern the effectiveness of STEP, and projects or courses that do not include them should not be considered adequate to carry the STEP name.

## **Main parts of a STEP programme**

A STEP programme should include:

- Employer support.
- Learning Needs Analysis.
- Learning outcomes and Objectives.
- Learning resources.
- Learning plan, with media and methods and optional e-learning and distance-learning elements.
- A Learner Guide.
- An Assessment Procedure.
- An Evaluation Procedure.
- Trainer recruitment and preparation.
- Trainer support.

## **Organisational commitment and management support by the learners' employer(s)**

The scope for professional development and the commitment and willingness of employees to improve their skills are important considerations when deciding about the propensity for organisational support.

Support for training and learning by the employer makes a contribution to the learners' achievements. To be effective in use, the course needs to be embedded in a suitable environment. It is important to know how an organisation can support learners to be involved in training. The focus of the organisation's activities should be in line with the objectives of the training.

The Programme should:

- enlist support from the learners' employer at the start,
- include the employer in choice of objectives and design of a course,
- identify the benefits for the organisation,
- show a clear link between the training and better service provision for a specific client target group,
- recognise and adapt to the employer's situation, such as provision of material relevant to the client group, costs, legislative provisions and so on,
- include in-work practice for learners,
- give feedback to the employer,
- include the employer in evaluation.

Training can be designed to be flexible in order to cover the curriculum within different time frames and learning modes. The choice of specific days (weekdays vs. weekends), frequency of training, season, duration, may all be adapted.

Some changes to normal work patterns may be necessary in order to enable the staff to join the training. Examples include:

- revisions of time schedules, weekly or daily plans,
- rearrangement of tasks, doing administrative tasks at other times or at home,
- delegation of work to other colleagues.

Changes to a daily work routine are minimised if the training takes place outside office or consultation hours and when management makes sure that the staff are entitled to some training days.

## **A STEP Learning Needs Analysis (LNA)**

A Learning Needs Analysis should be used to:

- decide the purpose or overall goal of the Programme for the employing organisation and individual learner,
- select the learning objectives to be achieved,
- plan the learning methods and resources to be used,
- ensure that the programme is suitable for the learners,
- find out about learners' pre-existing skills and need to acquire additional skills,
- adjust documentation and administrative processes,
- set up evaluation criteria.

The LNA may be a purely preparatory stage. It may also act as a more detailed assessment of prior learning, using the STEP assessment of learner skills documentation, so that learners are collecting / providing evidence of their skill from the beginning, and trainers are able to adjust the activities accordingly.

## **Learning Objectives**

The STEP Learning Objectives are arranged in twelve Units, each with brief notes on related elements of theory or knowledge. They include guidance on necessary prior learning and sequencing.

Guidance and forms for use in assessment of candidates for a STEP certificate are provided in the Learner Guide.

Learning Objectives for the programme should be chosen from among the twelve Units:

- knowledge, skills and competencies for the chosen objectives should be included and made available to participants;
- relevant learning modes and resources will be required for each Unit.

## Learning Resources

Typical Learning resources include:

- demonstrations by trainer or video,
- presentation and discussion of examples, evidence for skills and application of skills,
- micro-skill practice sessions using role play with co-learners, trainers or actors,
- larger-scale or more complex skill practice sessions using role play with co-learners, trainers or actors,
- reading materials and reference works, online or in print,
- in-work practice,
- in-work supervision by trainer or by qualified supervisor,
- classroom settings,
- solo study by traditional print or online methods,
- group attendance,
- trainer feedback in person, online, or face to face, to the individual or group,
- trainer feedback for submitted work or recordings.

The Learning Resources to be used may be drawn from existing exercises, e-learning elements, texts, case studies and other resources currently available from STEP Partners and / or created by the Programme provider in accordance with the STEP Quality Manual.

## Learning plan, including media, methods and optional e-learning and distance-learning elements

The Learning Plan is a detailed plan of what will be provided to each learner. The plan should include:

- a series of learning activities, which clearly add up to the overall Learning Objectives set out following the Learning Needs Analysis,
- a schedule which shows the sequence and timings of activities,
- the roles and duties of trainers in each activity,
- the expected actions by learners, employers and others during each activity,
- the application of resources in activities,
- procedures for assessment,
- procedures for evaluation.

The learning plan should also include an ‘installation phase’, which will:

- prepare the media and any technical aids such as accommodation, teaching aids, e-learning systems, web-based conferencing and learning, download and print facilities and online as well as paper records,
- test the media and technical aids to ensure they deliver as planned,
- train the users of technical media (trainers, learners especially) to ensure their complete confidence,

- prepare learners for what to expect, and what is expected of them in both technical and in-person activities, such as role-plays, use of recording and web systems etc.

## The Learner Guide

The Learner Guide introduces a course to a prospective learner and gives them essential documentation. It does not replace the Learning Needs Analysis nor the Induction of learners to a course, both of which should be carried out by local staff or tutors.

The Learner Guide includes the following sections, each of which needs to be reviewed and completed by the course provider to comply with local circumstances, teaching, methods and regulations:

- Organisations and personnel.
- Programme Overview.
- Registration and Certification Information.
- Induction Checklist.
- Induction.
- Programme Timetable.
- Unit Details (learning outcomes and assessment criteria for included units).
- Assessment Documentation.
- Assessment Planning and Feedback.
- Plagiarism / Malpractice Policy.
- Health and Safety.
- Candidate Appeals Procedure.
- Complaints Procedure.
- Equal Opportunities Policy.

## A STEP Assessment procedure

The STEP assessment should focus on the observable performance of the competencies by each candidate for a STEP certificate.

It is not permitted to omit observation of performance, nor to substitute:

- attendance requirements,
- study for a minimum set period of time,
- examination(s) using essays, multiple choice questionnaires, theses,
- requirement for a separate fixed standard of education, such as a higher degree, a recognised professional qualification.

These assessment methods may be included in addition to the STEP assessment only if they are necessary to the reaching of an officially recognised educational certificate.

The best assessments are carried out in real-work settings, but close-to-real simulations may be used.

People who are competent in using STEP skills may be assessed for a STEP certificate:

- separately from any other qualification or assessment,
- within another qualification or assessment provided STEP criteria are met,
- without additional training where there is reason to believe they already have the necessary skills.

## Staff delivering STEP

In person support and tuition of learners is an essential element of STEP programmes. E-learning and related learning modes are valuable additions and enhancement, but no current technology is able to monitor and assess skill development nor to provide adequate feedback to learners.

First hand understanding of and high-level experience and competence in the skills to be taught and assessed is required.

STEP Programmes may be constructed and delivered by teams. Each person in the team should contribute to the quality of the tuition, as described in Quality Assurance, below.

## Evaluation

Evaluation and feedback is important for improvement of STEP Programmes.

Evaluation should include measures of both the quality and effectiveness of the course, aiming to maintain and develop quality over time.

Evaluation should be related to and measure the impact of:

- development of learners' skills and competencies,
- development of self-efficacy for competencies,
- the content of training,
- the delivery of training in all modes: direct trainer and group interaction, e-learning, self-study, tutoring,
- usability and accessibility,
- satisfaction of learners and their employers.

A good quality evaluation will measure the change in learners' activities and behaviours by observation before and after the training, and may therefore share

data with a Learning Needs Analysis and Assessment procedure. However, the data is to be analysed to determine the effectiveness of a course of learning, not to assess individual performance.

Measurement of behaviour change by independent observation is the highest standard of evaluation, but is costly and difficult. Observation by trainers and learners is a fair substitute when it is based on clearly defined data and procedures. Self-evaluation through scoring of achievement or confidence statements by learners can contribute to evaluation but is difficult to control and subjective.

The evaluation should provide reasoning and direction to improvements in the programme.

## **Installing a Programme**

### **Select the employment-service provider and employer of learners**

Decide whether it is better to provide a single-employer course (e.g. PES officers), thus providing the greatest focus on organisational goals, or to have a more diverse group with learners from employers and backgrounds, which could encourage an exchange of experience and broaden the impact.

### **Select learners and decide what kind of programme is to be provided**

### **Recruit training staff**

When recruiting staff, whether from within an existing staff team or from outside, organisers must use competence-based recruitment and assessment procedures, and must not use existing posts held or job descriptions as a substitute for assessment of skills.

STEP Learning Objectives provide a suitable framework for assessment of the skills, knowledge and competence of trainers.

Assessment for staff recruitment may include assessment for additional support they may need in preparation for teaching.

## Prepare staff

Few staff will be fully able to deliver a STEP programme without some preparation. Steps to prepare staff will include:

- review of existing staff skills and experience, which may be done during recruitment,
- additional training or experience-gaining of staff, including theory and practice, in sufficient depth to enable them to address doubts and challenges from future learners,
- training in use of teaching methods,
- support for compliance with the curriculum and quality manual with emphasis on:
  - ✓ enhancement of self-efficacy of trainers and of learners,
  - ✓ in-person contact with the local labour market,
  - ✓ group and individual communication,
  - ✓ enabling trainers to carry out accurate demonstrations of skills and give accurate feedback;
- Involving staff in the design stages of the programme.

## Carry out a Learning Needs Analysis

During the LNA it is useful for future learners and employers to have access to the Units and general information to help them in decisions about the curriculum.

STEP Programme designers should discuss the programme with

- the learners' employer or a representative group of expected future employers,
- the learners themselves,
- other staff involved in the programme,
- staff from a range of organisations whose jobs will be directly affected by the changes to practice brought about by the training. This may be needed, for example, when advisors (qualified learners) are in regular contact and co-operation with social workers, medical staff, educational establishments and so on.

A record of the information resulting from the Learning Needs Analysis should be kept, and it should show a direct link between the identified needs and the design decisions that are made.

## Preparation

Before the start of a programme, designers, usually including the trainers, should prepare:

- the Learner Guide,
- A Course Learning Plan, including:

- ✓ modes of study:
  - face to face group,
  - solo study,
  - In-work learning, experience or practice,
  - e- or distance-learning materials,
  - group learning and setting up and supporting action-learning groups;
- ✓ the Learning Resources to be used. These may be existing or created for the specific programme. In either case, care must be taken that they conform to the standards set out in the Quality Manual,
- ✓ guidance for employers,
- ✓ instructions, procedures and access to resources,
- the Assessment and related feedback procedures, including appeal and verification of genuineness of evidence,
- Evaluation, review and enhancement procedures for the programme.

It is highly advisable to subject all of these to testing with the active involvement of learners, or people who are similarly placed, to ensure usability. For new technologies such as web-learning, group e-conferencing, use of video and audio, pre-testing and training of users is essential.

Before delivery begins:

- learning / teaching spaces, accommodation, food and drink, technology should be available and checked,
- key learning events such as group and in-person exercises should have been timed, trialled and adjusted,
- learner recruitment (learner guide, signatures etc) procedures should be complete,
- learners should be familiar with the work they will have to do – for example (this is not an exhaustive list):
  - ✓ role play and micro-skill rehearsal,
  - ✓ employer visits,
  - ✓ group discussion,
  - ✓ homework and solo-study,
  - ✓ collection of case studies,
  - ✓ use of e-learning tools, internet, web systems, distance technologies;
- trainers should be sufficiently familiar with the programme and the available resources to make adjustments during delivery without losing the focus on learning goals.

## Delivery

During delivery, in addition to providing training and assessment that conforms to the Quality Manual, there should be provision for:



- mutual support among trainers,
- organisational support for trainers,
- uninterrupted working time for trainers and learners,
- organisational support for learners from the training organisation and from their employer,
- sufficient time for rest and reflection by learners and trainers.

Support to learners may include:

- in person by trainer to individuals either during group sessions or outside them,
- by trainer to the learning group,
- e-systems such as telephone, e-mail, skype, text messaging, video conferencing and webinars.

## Mix of learning modes

Training will usually include a series of attendance-events, e-learning and resources and work-based practice, so that skills can be consolidated in real-world practice and so that learners can adapt their thinking or personal theorisation as their experiences unfold.

## Further help and support

Successful installation and running of the training can be boosted by further support and creation of appropriate conditions. The following are useful:

- regular observation of learners by trainers,
- inclusion of learner-tutor consultation sessions,
- on-the-job coaching,
- consolidation and updating of skills through ‘refresher’ events
- allocation of longer time-span (more days, but similar direct tuition) to allow for better understanding of concepts and techniques and to provide time for reflection and peer review.

## Continuity of LNA, Feedback and Assessment

Feedback and Assessment should move from the Learning Needs Analysis, through the Delivery phase, to the final or summative Assessment.

## Assessment

Assessment procedures should:

- be explained to learners before the start of the course,
- be supported by documented instructions that enable learners to collect and present the evidence of their skills,

- be carried out in a timescale that allows learners to respond to feedback and improve performance where necessary,
- have a definite end date.

Suitable forms for use during Assessment are included with the Learner Guide. They may be extended and adjusted, provided that the standards of evidence are not diminished.

Assessment will usually be carried out over the span of any training event, to provide for learners' progressive assembly of evidence, and to provide feedback that supports the learning process.

Candidates who enter the Assessment without taking training must be provided with full documentation and with support, in accordance with their needs, to assemble their evidence of skill. This will usually require an extended time. The goal is for candidates to be assessed on their skill at the tasks required, and as far as possible not assessed on their ability to complete forms, gather evidence and submit to the essential administrative requirements. These latter tasks are necessary, but assessors who offer help with the process, without falsifying the evidence produced by the process, will be providing a sound basis to the candidate to present his or her skills.

## Evaluation

Evaluation procedures and materials should be:

- prepared before the course begins,
- tested, to check (and revise if necessary) that learners and employers understand the questions and that their responses provide information useful to the development of the course,
- available in paper and online or e-form, according to the resources used in the programme.

Evaluation should lead to continuous improvement.

Ideally evaluation will be carried out independently of the trainers. However it is not always possible to distribute and collect evaluation materials without trainers' active help. Where this is so, there should be an independent review of the evaluation returns, and the reviewer should preferably be 'blind' to the identity of the learners and trainers, and also (as far as practical) to the measures being evaluated.

Although it calls for more organisation and effort, it is worth carrying out evaluations that compare courses of different design or different trainers.

Great value is to be had from assessments that compare course to placebos or alternative activities. Crossover studies in which half of the learners receive the course and the other half an alternative, and then reverse, allow all learners to get the 'active' STEP course, while also acting as their own controls. This design permits double-blind testing of course designs.

Evaluation results should be shared with the course / programme designers and with trainers within a short time of the course end. They should also be shared with learners and with their employers, if involved, but confidentiality of personal responses must be maintained.



## Employer support

### Enlist support from the learners' employer at the start

The learners' employer may or may not be the person or organisation that is commissioning and running the STEP programme. Non-commissioning employers are likely to a fuller introduction to the programme.

Training and development rarely works, or becomes embedded practice, without the support of senior managers or leaders. They need to know what they are getting and not getting from the course. If they are not commissioning, but are sending staff 'out' to attend a course, they should also know the implication for their learners (advisors) and their 'on the job' training requirements.

Both senior staff and advisors' line managers need to be engaged to ensure the learner succeeds. This includes explaining the nature of STEP, relating it to the work undertaken by the employer and encouraging them to be active in all stages. A written description of who will do what and how the relationship will be managed (for example covering changes in circumstances, costs, copyrights, and other matters) is desirable.

### Include the employer in choice of objectives and design of a course

The Learning Needs Analysis (LNA) should take note of the employer's goals and business situation. Employers should approve the contents of a course.

### Secure active co-operation from the employer, and recognise and adapt to their situation

Employers face operational constraints and costs that should be taken in to account as far as possible in the design of a course. If the course cannot meet both the employers' constraints and the course content quality measures, it should be discussed to find a suitable conclusion. For example the learning objectives may be reduced in number, the duration of learning may be adjusted to suit the learners' prior experience.

If an employer is unable or refuses to accept the quality standards the provider should consider whether to continue.

Employers should:

- ensure that the operational setting in which staff learners work is supportive of the skills,
- be ready to change practices that are hostile to effective practice or good learning,
- take organisational steps to enable learners to attend training,
- make sure that learners are able to make these changes with minimum disruption.

Several issues have to be addressed with the employer:

- provision of a feasible duration for the training programme,
- costs of rearrangement of operations,
- labour supply:
  - ✓ substitution for absent staff,
  - ✓ transferring of tasks between staff,
  - ✓ completion or postponing administrative activities,
  - ✓ inclusion of extra staff time into standard working time.
- learner resistance to new ideas and practices, remembering that willingness is crucial to personal development,
- risk of employees' leaving the organisation after completion of the training course.

The number of clients for each advisor, which is often larger than ideal, needs to be taken into account when implementing procedures and applying the learning to achieve high quality.

## **Include in-work practice for learners**

The application of skills in real-work setting both during and after training is important. Employers should be encouraged to support their staff in applying the newly learned skills. This will involve:

- explaining the skill to employers,
- showing employers and supervisors what to expect,
- discussion of how to resolve confidentiality issues,
- trainers visiting the workplace to offer support before and during practice,
- gathering feedback from employers and supervisors to improve the course.

## **Give feedback to the employer**

Employers should get feedback about the running of their programme, the results and the opinions of their staff who were involved. They should be informed of the results of the evaluation and about how their opinions have helped shape the provision.

Learners and trainers should brief their managers on the course and its achievements.

Besides, satisfaction of staff with the results of training should be assessed so that not only clients (and hence management) but also advisors feel comfortable and confident with a changed practice.

The learners' confidentiality will however need to be preserved. Employers should be aware of this; both they and the learners' should agree to the rules of confidentiality before the start of a programme.

## Include the employer in evaluation

Employers feedback about the course makes a valuable contribution to its development. They should be invited to comment on each stage of the programme. Personal contact can add deeper understanding to written or online feedback.

## Learners

Learners should always be people who will be actively using the skills of employment advice and guidance in their work.

Learners may be

- new to the profession and in need of a complete study of all Units,
- existing staff adding to some or all of their skills, or refreshing their professional competence,
- staff needing to extend the scope of their abilities by in-depth study of selected Units.

Learners are not required to have, nor are any debarred by, any specific prior qualifications.

Organisational commitment and management support is to be enlisted wherever possible: it makes a vital contribution to skill development and training resources.

The employing organisation should understand and approve

- the Learning Objectives,
- the training methods,
- the priority for skills,
- their role in supporting learners' activities, in-work practice and in work observation and assessment.

A high level of employer involvement or support is not always available. Where it is lacking, tutors and course designers should work with learners to find alternative sources of real-life practice and assessment.

## Induction

Pre-course material should provide information on the course design, content, and requirements.

Prospective learners should be encouraged to make positive decisions about course attendance.

Pre-course information and recruitment processes should:

- include a list of skills and knowledge required for eligibility for the training,
- explain what counts as relevant prior experience,
- contain information about what the employer expects,
- describe the work-relevant behaviours the training is aiming to change,
- explain how people are selected for training.

If a 'formal' or 'informal' process for selection of learners is included, the selection methods must relate to skills and learning needs of applicants.

## Support for learners

Tutors and supporting systems should to identify and support weaker learners to build their confidence. There should be opportunities to repeat exercises, without stigma for weak performance. Confidentiality and trust is required when such support is given.

Strong or more advanced learners should be supported to progress and not held back by the learning group.

There must be an agreed process for supporting learners who show signs of being uncomfortable with the learning material, whether through personal disagreement, for professional reasons, or for legal or work place obstacles to the application of skills.

Feedback to learners should be provided, after and during each exercise and from continuous assessment.

Learner confidentiality will be maintained:

- personal data will be protected in accordance with law and natural justice,
- consensual rules on sharing for information or experiences within learning groups will be established and monitored,
- opportunities for in-person individual confidential discussions between trainers and learners.



There should be provision for learners to leave the programme with appropriate exit-counselling.

Trainers must be confident to manage engagement and exit strategies for all learners.

## Learning to learn (pre-learning and during learning)

Learners should be coached in the use of learning techniques so that they become able to apply them to acquire skills: the purpose, methods and goals of the learning modes in use must be explained, demonstrated and monitored.

## Learning Needs Analysis (LNA)

A Learning Needs Analysis will be conducted before training.

The LNA will establish and provide guidance on course delivery. It will consider:

- the importance of the learning to learners' jobs,
- the support from learners' employers,
- the skills where learners feel more or less confident and development is desirable,
- the resources for, access to and restrictions around:
  - ✓ in-work practice,
  - ✓ simulation and skill-practice,
  - ✓ e- and distance-learning,
  - ✓ all aspects of attendance at in-person training:
    - ease of use,
    - use of group learning.

An LNA should include discussion:

- with the employer about their operational and business goals for the training,
- with each learner about their work and how they could develop their skills, problems they face, things they do well,
- about the clients who use the service and the conditions under which the service is delivered.

An LNA should identify that learners possess attitudes and basic abilities required for starting the course: learners should:

- have good general-purpose social skills, ability to communicate and to show empathy,
- be willing and happy to work with different races, ethnic groups, religions, ages, abilities, occupations, employers, and genders subject only to any valid specific legal or religious exclusions,
- be willing to practice and learn new behaviours and incorporate them in their

- professional work,
- be willing to undertake some reading and study of supporting texts to inform their critical appreciation,
- be willing to comply with legal requirements.

A Learning Needs Analysis should identify:

- learners' training ambitions / goals and personal aspirations,
- the relevant goals and organisation objectives for a learners' employer,
- learners' prior skills and learning needs in relation to the Learning Outcomes,
- attitudes to experiential learning,
- learners' personal ability, their strengths and needs relating to the curriculum,
- organisational support to undertake the training,
- real life job demands and the relevance of the training,
- the opportunities for real-life experiences as part of the learning process.

A satisfactory Learning Needs Analysis will enable the designers to:

- select all or some of the Units and Learning Objectives,
- create or select learning materials relevant to the learners and their programme,
- use face to face and distance learning modes appropriately,
- support groups and individual learners,
- use e-learning and related methods appropriately,
- prepare trainers and assessors for the event(s).

An observation of the workplace and learners or their colleagues at work brings valuable information to add to self-reports and discussion.

Skill observation of learners should be in a field relevant to employment advice; so for example communication skills learned in a therapeutic setting may need to be relearned (perhaps with more or less effort) for application in the employment setting.

If an LNA is used to gather evidence for assessment, the full assessment procedure should be applied.

There should be a direct logical link between the findings of the LNA and the nature of the programme that is offered. This programme should be seen and approved by the employer and learners before it begins.

The Learning Needs Analysis results in adaptation of the training to the skill and learning needs of the employing organisation and the learner, but not in reduction of the quality standards.

## Learning Outcomes and EQF levels

The Learning Outcomes, defined in European Qualification Framework format, are given within the Learner Guide, Appendix 1.

In the context of EQF	Knowledge is <i>theoretical and/or factual</i> .	Skills are <i>cognitive</i> (involving logical, intuitive and creative thinking), and <i>practical</i> (involving the use of methods, materials, tools and instruments)	Competence is <i>responsibility and autonomy</i> .
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Relevant EQF levels for STEP are:

- For Knowledge: ‘L3 Knowledge of facts, principles, processes and general concepts, in a field of work or study or L4 Factual and theoretical knowledge in broad contexts within a field of work or study’.
- For Skills: L6 ‘Advanced skills, demonstrating mastery and innovation, required to solve complex and unpredictable problems in a specialised field of work or study’.
- For competence: ‘L4 Exercise self-management within the guidelines of work or study contexts that are usually predictable, but are subject to change; supervise the routine work of others, taking some responsibility for the evaluation and improvement of work or study activities’ or L5 ‘Exercise management and supervision in contexts of work or study activities where there is unpredictable change; review and develop performance of self and others.’

Choosing L6 for knowledge would bring the required knowledge-learning above the level necessary for skilled delivery of an expert employment counselling service.

Choosing L3 or L4 for skills would reduce the skills required for successful assessment to below the level required for delivery of an expert employment counselling service.

The level of responsibility and autonomy required for advisors working within a structured and well-managed organisational environment is quite well described by L4. Advisors working without structured and ethical organisational support, or who are providing some degree of supervision for others will need to be qualified to L5 or above.

For a standard implementation of STEP within a structured and ethical organisational framework, we recommend EQF level 4 as the minimum for the whole course. However, in practice, the recommended EQF level for the course would be L5 or L6 as this level is most common and appropriate for training programmes in an employment advice domain within national educational systems.

Organisations implementing STEP within their own national or organisational framework should take advantage of their flexibility to propose qualifications and assessment arrangements that reflect the balance of knowledge, skills and competencies required of professional employment advisors.

The Learning Needs Analysis should provide sufficient information for a link to be made between:

- learning needs,
- the choice of learning objectives, knowledge, skills and competencies,
- the choice of learning resources and learning modes.

Knowledge, skills and competencies should be used during teaching and assessment to guide behavioural goals and outcomes.

Learners should be encouraged to use the skills lists from the curriculum during skill practice and feedback sessions, and may also apply them in work.

Instructions on necessary prior learning and sequencing, given in the STEP EQF Knowledge, Skill and Competence Learning Outcomes, should be respected. Failure to do so may impair learners' progress in acquiring competence.

The STEP Learning Units and Assessment Record does not contain all the possible examples, exercises and processes that will be needed in an implementation of the course. These can be constructed by course providers and tutors, using this Handbook as a guide. As a general rule, every element of every implementation should:

- meet the standards described here,
- address the learning needs (see LNA above) of the learners who will be recruited,
- provide learning that meets at least one of the Learning Outcomes elements.

The inclusion of objectives that are not included in the STEP Units must be supported by independent scientific research of good quality. Randomised controlled trials that have been replicated offer the highest standard, and should be sought.

There are many examples of good ideas, good practice, commercial products, novel procedures and expert opinion and professional guidelines that are not supported by independent evidence, or are supported only by self-publicity and assertion. Without making any claim as to the validity or otherwise of these, they do not form part of a STEP programme.

The Learning Outcomes are included in the *Moodle* online learning management system available at <https://moodle.skillstep.eu>.

## The Learner Guide

The Learner Guide should be developed for all programmes or courses that lead to a formally accredited course. The exact form it takes will depend on the local circumstances and requirements of the accrediting body. The Guide provided has guidance on what is most likely to be required for administrative, learning and policy reasons.

Where a programme or course is used in a less formal setting or without officially recognised certification, the Learner Guide should be used as guidance on the information that learners are likely to need before they join.

## Staff and trainers

Staff who design and deliver STEP courses, training and assessment must be suitably skilled. They should have mastery of every aspect of the curriculum individually or as a team. They also should possess

- first-hand experience of providing effective employment advice,
- sufficient experience to have encountered ethical problems, failures, difficult clients and unhelpful circumstances as well as successes,
- experience of more than one type of employment programme. This would include varied experience of different sectors of provision – public, private, NGO – and various client groups such as disabled people, long-term unemployed, migrants,
- a critical awareness of and ability to present evidence and theoretical reasoning,
- ability to provide individual and group learning environments in line with the curriculum requirements of all the Units,
- ability to work with relevant e-learning environments.

Trainers must be experienced and proficient in:

- the application of self-efficacy principles in employment counselling,<sup>3</sup>
- the application of self-efficacy principles in training or skill-development,
- leading groups of adult learners,
- encouraging co-operation, active participation and managing discussion so that all learners are engaged,
- supporting weak or slower learners,
- recognising advanced or confident learners and ensuring they are able to progress,

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<sup>3</sup> For further details see the Unit ‘Developing Clients’ self-efficacy’ and refer to ‘Employment Advice, what works for disadvantaged people’ (see Appendix 2)

- providing demonstrations of skills,
- observing and identifying skills applied by learners in practice sessions,
- providing feedback and feedforward,
- managing learner-to-learner feedback by providing clear, relevant roles, and intervening to counteract inappropriate feedback,
- provision of employment advice in accordance with the principles established in ‘Employment Advice, what works for disadvantaged people’<sup>4</sup>, and with sufficient experience to be able to answer learners’ questions and respond to complex or difficult situations that learners may bring up,
- training groups and individuals in interpersonal skills,
- supporting learners by building an atmosphere of trust and modelling a positive attitude.

## Goals

The goals of training must always include the enhancement of advisors’ skill in the provision of employment advice, with the three significant outcomes that:

- 1) it enhances a clients’ own capacity to make choices and act independently, and effectively, in their chosen labour market;
- 2) it supports clients’ current, or future, employers through better equipped employees and strengthened relationship with the employment support service;
- 3) it improves the effectiveness of employment-support services, through outcomes 1 and 2.

The goals should not include clients’:

- physical or mental therapy,
- psychological conditioning in response to clients’ or advisors’ mental state,
- social adjustment or integration,

though it is noted that change, improvement or worsening may occur as a side effect, and any notable worsening should lead to re-appraisal of the service being offered to the client.

## Objectives

Learning Objectives for the training will be those specified in the curriculum. Additional learning objectives may not replace or dilute those in the curriculum.

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<sup>4</sup> Published by the STEP programme and available free of charge from STEP partners, this review of evidence for effective employment guidance includes guidance on skills of advisors and skills for learning-group leadership.

## Priority for skills

The training is designed to enable learners to acquire appropriate job related skills. The training is founded on the concept and procedures of self-efficacy: self-efficacy building techniques leading to skill development and mastery must be applied to the learning processes.

The training should include an explanation of self-efficacy for the learners so they are aware of the concept and why it is important.

‘Errorless learning’ principles must be applied in the design of skills exercises.<sup>5</sup> Examples should be close to the actual job tasks being taught.

The training should include monitoring of both learner performance and self-efficacy.

Exercises are to be structured so that individuals have the optimum opportunity to practice, get feedback and acquire the skills.

Planned behaviour change for learners should be specified as learning related to their professional tasks in accordance with the programme’s goals and objectives. The anticipated behaviour change should be observed and measured.

Knowledge and information must be provided in a way that complements skill development.

Learning should be applied immediately, or as soon as possible, in a real-work setting, to encourage consolidation of skills. Opportunities should be given for learners to apply the skills both in practice exercises and at work / real life.

The sequence of training is important:

- training leads from simpler to more complex skills,
- pre-requisite skills for later learning are acquired earlier,
- new material relates to what learners already know,
- training methods enable learners to integrate new material.

Effective training exercises will contain each of these elements:

- explanation, examples and theoretical background on the importance of the skill being learned,
- demonstration of the skill in use,
- opportunity to discuss the use of the skill and ask questions,
- micro-skill practice to encourage error-less learning and confidence-building,
- progressive application of skills in more complex or demanding situations,
- constructive and helpful feedback to each learner and to the learning group.

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<sup>5</sup> Self-efficacy as applied to employment advice skills, and the application of errorless learning are described in more detail in the STEP publication ‘Employment Advice for Disadvantaged People: What works’, available from the project partners.

Learners should be active in skill practice and in discussion and reflection. All training materials should be chosen to support the achievement of one or more specific learning objectives. Materials which do not support the objectives should not be included.

## Usability by learners, trainers, managers

Users should be involved during the design and development stages and in design and testing of any accessibility or usability solutions.

### Location

The location must be accessible to learners without undue cost or difficulty. The physical and social environment (training space) must be safe, comfortable, and enjoyable.

### Duration

The course and training sessions should be of a suitable length to hold attention, allow skill practice and reflection, but not to fatigue.

The overall duration of training should be long enough for skill practice and development, but not so extended that skills diminish between sessions or fail to develop.

The arrangements and duration of post learning support and consolidation from tutors or course staff must be considered in the light of skill development opportunities.

Many Qualification Awarding Bodies apply requirements on the duration of training and attendance record of learners. These requirements may be respected in the provision of a STEP Programme, but are not required by it.

There are no set durations for training. The duration of a course and the proportion of time spent attending or working alone or online will be determined by the Learning Needs Analysis, and may vary greatly. For example, a new learner with no previous experience may require weeks or months of practice fully to master the interpersonal relationship skills required in employment counselling, and this may be supported by longer or shorter classroom settings and in-work guidance according to the circumstances. On the other hand, a more experienced advisor may be able to assimilate and apply new skills to liaise with employers and line managers in a much shorter time. These are examples; the testing and improvement of a course will lead to more precise definitions of duration and required teaching input or intensity.



## Learning and training methods and learner activity

The training addresses ideas, skills, practice and understanding using multiple training methods. The method chosen should relate to the learning point and the activity of the learner.

The Programme is divided into twelve Units in two groups:

- The first group, 'The client's journey to work' addresses skills needed to support clients in their progress towards work, making specific reference to support needed in each of the stages that clients move through.
- The second group 'The Advisor's toolkit' addresses the skills that advisors need in each and all the stages of the client's journey to work.

An implementation of the STEP Programme in a specific training course is unlikely to teach the second group separately from the first; it is natural, and positive for understanding and skill development that the 'toolkit' be learned in the context of the 'journey to work'. Factors to support effective learning in such a 'mixed Unit' learning context are:

- the sequence of learning should be followed: for example, the application of self-efficacy and of interpersonal communication need to be developed early, and to help with this only simple examples of client-advisor interviews should be used until learners' confidence is strong;
- real-life examples are useful; case studies, visits to employers, recordings of interviews are all useful and can be applied across several Units;
- the pace of learning should reflect learners' individual acquisition of skills: expecting them to handle complex and demanding cases before they have sufficient confidence and skill can damage their learning;
- learning styles vary; learners like to study theory before, during or after practice, following their own preferences. A flexible timetable and sequence for mixing learning elements can be helpful.

## Group support<sup>6</sup>

The programme or course should:

- be designed for the group size and provided with a sufficient number of trainers,
- help the group to agree shared rules or values,
- include the whole group and sub groups in active learning in the trainer-led sessions,
- include scope for group collaboration / action learning sets supported by the trainers and facilitated by distance learning and in-person work,
- incorporate at-work real-job issues raised by learners.

## Post-training and at work

There should be supervised application of skills and consolidation of learning at work.

There should be opportunities for learners to reflect on their use of learned skills at work.

Both group and solo consolidation activities should be included as appropriate.

Managers should be prepared in advance for their role supporting each learner in the workplace

Post training monitoring should include job performance and future development.

## Learning Resources

Courses provided under the STEP Programme must be adequately resourced to enable learners to understand and to practice skills with sufficient support and guidance. This includes physical, social, time, environment and personal resources.

The selection of resources will be explicitly linked to Learner preparation and support, Learning Outcomes, so that the contribution to the learning is explicit.

A selection of exercises suited to each Unit is available. They may be adjusted or added to by the Programme provider.

Learning Resources must provide adequate time, physical and social resources for learning, including recognition of slower and faster learners and individual learning patterns or styles.

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<sup>6</sup> For further detail see Unit 9 Design & application of Group Events

All skill development resources should include

- a rationale for and description of the skill, preferably with citations or links to relevant evidence,
- a demonstration of the skill in practical application,
- opportunity to ask questions and discuss immediately following the demonstration,
- learner practice of the skill in a controlled setting,
- opportunity to re-practice,
- progressive application of the skill(s) in more complex real-life-like settings,
- feedback to the learner as individual and as group at each stage.

## Application of learning

- demonstrations by trainer or video should accurately portray the skill being used in the relevant context: the curriculum provides examples;
- case studies and examples should provide learners with contextual understanding;
- evidence presented in favour of skills should be from independent sources;
- micro-skill practice sessions should relate to the skills under study;
- larger-scale or more complex skill practice sessions are required to embed skill in real-life settings;
- reading materials and reference works should relate directly to the learning point. They are used to enhance reflective understanding, and to encourage critical debate inside and outside the teaching session;
- solo study by traditional print or online methods should not be so onerous as to distract from the aim of skill acquisition;
- the ability to locate, understand and make use of information is to be valued more highly than memorisation;
- writing of analytical essays and display of factual knowledge is not required; however, reading and discussion of theory elements is encouraged;
- in-work practice provides the optimum setting for use of skills, but also requires support by trainer or by qualified supervisor.

## Involvement of supervisory staff, management in the training

Involvement of supervisory staff, management in the training is strongly encouraged both for the boost it gives to learning; and also the support that learners receive at work:

- classroom environment and layout should encourage intra-group discussion, role play and skill practice;
- trainers should apply the standards to be found in Unit 6: Interpersonal Communication Skills in their work with learners online or face to face, and to the individual and group.

The number of trainers must be chosen so as to ensure adequate guidance and support for learners. As a general rule, the number should be such as to:

- provide an adequate pool of experience to support and respond to questions,
- provide effective demonstrations of skill,
- ensure good observation and feedback during micro-skill rehearsals,
- provide effective assessment support to learners,
- allow efficient and good quality organisation,
- allow for rest and reflection by the trainers.

An adequate learning environment, and learning media will be provided. They will:

- meet usability requirements,
- meet accessibility requirements,
- provide for easy communication,
- create and support a safe, confidential and relaxed learning environment in which experimentation and questioning are encouraged,
- provide access to information and support information flows between tutor and learners, and among learners,
- provide for accurate and comfortable transmission of ideas, debate, and materials,
- provide close and detailed observation of skills.

The use of specific methods within an overall learning environment will depend on the learning task being addressed. The following table, which is not exhaustive, provides examples.

**Table 1. The use of specific methods within the learning environment**

	One to one tutor-learner	Tutor-in-person with learner group	Tutor-led distance learning	Learner-group in-person without tutor	Learner-group at-a-distance without tutor	At-work learner practice	Learner solo study
Learning Needs Analysis	Desirable	Possible with a group of similar learners	Only for information giving	Not suitable	Not suitable	Useful for observation by tutor	Only for providing information
Preparation of learners for study	Desirable	Desirable	Desirable	Not suitable	Not suitable	Possible	Only for providing information
Tutor guided discussion	Good for personal feedback	Desirable	Desirable	Tutor review of discussion required	Tutor review of discussion required	Only for in-work training events	Not relevant
Learner observation of skills	Possible- unusual, mainly for feedback	Desirable	Video and audio possible, with guidance.	Video and audio possible, with guidance.	Video and audio possible, with guidance.	Possible in a mentoring situation	Video and audio possible, with guidance.
Learners' micro-skill practice	Possible- unusual, mainly for corrective feedback	Desirable	Difficult. High risk of lowered standards	Not suitable. Group norms may over-ride quality standards.	Not suitable	Possible in a mentoring situation	Difficult. High risk of lowered standards.
Learners' consolidation of skills	Desirable for assessment and feedback	Possible but not as effective as in-work practice	If technology supports observation and feedback.	Only for expert learners. Not suitable for others.	Possible if technology supports observation and feedback.	Desirable	Suitable for reflection & evidence collection by learners.
Supervision and feedback to learners	Desirable	Desirable	If technology supports observation and feedback.	Risky. Group norms may over-ride quality standards.	Only for reflection and group support Tutor review required.	Desirable	Not possible (learner is not in contact with tutor).
Learner's reflection	Desirable	Desirable	Desirable	Possible. Feedback to tutor required.	Possible. Feedback to tutor required.	Desirable. Feedback to tutor required.	Desirable. Feedback to tutor required.
Developing underpinning theory	Useful for tutor support	Desirable but avoid lecturing	Desirable	Tutor review of discussion required	Possible. Feedback to tutor required.	Unlikely to be effective	Desirable
Delivery of training materials to learners	Possible	Desirable	Desirable	Possible	Possible	Desirable	Possible
Assessment of learners' skills	Desirable	Desirable	If technology supports observation and feedback.	Not suitable	Not suitable	Desirable	Not suitable

Source: STEP Partnership own development.



# Distance and e-learning

The STEP Programme acknowledges that some learners find personal attendance difficult for reasons of time away from work, travel distance or personal commitments. The use of e-learning and distance methods are therefore encouraged, with the limitation that skill practice and in-work practice cannot be replaced by reading or observation alone, useful though these methods are. Skill development must come through progressive and real practice. Tutor observation of learners' skill practice may be facilitated by e-communication, skype, telephone or other methods, under carefully controlled situations, but a wholly distance or e-learning environment is unlikely to meet the required standard at the present time.

E-learning within the STEP Programme courses should:

- be amusing, interesting, interactive, simple and intuitive to use,
- be a platform for collaborative working including instant messaging, message boards, facilitated & unfacilitated groups, webinars, podcasts, skype-a-like,
- provide sharing & online discussion for dispersed learning groups with and without tutor input,
- provide access to texts and documentation and descriptive materials, theory and evidence,
- provide evaluation and accumulation of evidence and credits for learners,
- support formative & summative assessment, quizzes, and other learning tools that are approved by the curriculum,
- provide for video & audio examples for use by learners in group or solo learning,
- provide video recordings to support skill demonstration by tutors and skill-practice by learners,
- provide trainers with access to teaching resources , exercises, PowerPoints etc, in a cumulative, updateable and trackable format,
- provide trainer-training support, materials, schedules, curriculum and evaluation,
- provide scheduling facilities for courses, assessments and evaluations,
- provide for new organisations and trainers to sign up and become accredited,
- abide by WCAG international accessibility standards,
- apply in the learners' own language(s),
- work across a cross-section of devices / systems.

Must not:

- be non-interactive screen text. For example a straightforward screen presentation of a leaflet, essay, document would be inappropriate except for specific download or reading;

- try to replace personal skill practice with reading or writing;
- reduce the status or application of real-life evaluation of learners' progress and skills. IT & the learning platform should not replace assessment methods such as observation and accumulation of evidence with technical alternatives that do not test skill (multiple-choice tests are an example, though they may be used in a mixed-learning setting);
- reduce the impact of shared group discussions and events by encouraging isolation, but instead should positively encourage communication and involvement of learners.

Criteria to apply in evaluating e-learning should cover:

- user involvement and feedback in the design stages;
- intuitive use both overall and in detail, and ease with which a new user can learn how to use it successfully with minimum amount of prior knowledge;
- relevance of content to the learning;
- achievement of learning objectives, and ease in achieving objectives;
- satisfaction of users;
- accessibility users who are disabled, either unaided or using assistive technology, with use of web accessibility evaluation tools;
- functionality of sites, players, apps, plugins, etc;
- readability of text and quality and understandability of video and audio;
- clarity of meaning and absence of ambiguities;
- avoidance of jargon.

All technical tools to support learning, but specially e-learning modes must

- be designed to be easy to use,
- be robust against failure,
- offer high-quality reproduction of text, images, audio, video and personal interaction,
- be tested,
- be taught to the users before training begins so that their use of the tools does not delay their skill learning.

Table 2 provides guidance on the application of face-to-face, distance and e-techniques.



**Table 2. Application of face-to-face, distance and e-techniques**

	Hand-outs	e-text	Video / Audio	Webinar	Lecture in-person	Role play / Simulation	Discussion	Lesson plan	Questionnaire	Case Studies	Employer visits	At-work practice with clients
Course information	✓	✓		✓			✓		✓		✓	
Learning Needs Analysis	✓	✓		✓			✓		✓		✓	✓
Preparation of learners for study	✓	✓	✓	✓	✓		✓	✓	✓		✓	
Background or theoretical study	✓	✓	✓	✓	✓		✓			✓	✓	
Demonstrations and examples	✓	✓	✓	✓	✓		✓	✓	✓		✓	✓
Micro skill practice						✓	✓					✓
Complex skill practice	✓			✓		✓	✓	✓				✓
Gathering evidence of skill		✓	✓			✓			✓	✓		✓
Supervision and feedback to learners			✓	✓		✓		✓				✓
Assessment	✓	✓		✓	✓	✓	✓		✓	✓		✓

# Step adaptation, Quality, Assessment & Evaluation

## Country specific knowledge and materials

Information and knowledge specific to the country, profession or work task may be added to the curriculum, for example:

- Legislation.
- In-country employment programmes and services.
- Working practices.
- Assessment methods.
- Attendance requirements.

Such additions must comply with and must not replace the quality measures here. See also the section on Assessment.

## Assessment

Competence in the skills is to be shown by observable performance of the skills by learners. The STEP EQF Knowledge, Skill and Competence Learning Outcomes will be used for assessing competence. They are given in the Learner Guide at Appendix 1.

Assessment is to be measured as demonstrating competence, or not. There is no provision for accumulation of grades that may compensate inadequacy in one area by higher scores in another. Two scales are used:

### 1. **STEP EQF Competence and Skill Scale**

- Not demonstrated
- Demonstrated in simple simulation
- Demonstrated in life-like simulation
- Demonstrated in real work setting
- Prior ability demonstrated.

### 2. **STEP EQF Knowledge Scale**

- Not demonstrated
- Demonstrated in learning group discussion or learner-tutor review
- Demonstrated by own presentation and review via case study
- Demonstrated by review or analysis of complex real-life situation
- Prior understanding evidenced.

The Learning Outcomes and Assessment Scales are included in the *Moodle* online learning management system available at <https://moodle.skillstep.eu>.

Case studies may be used both in assessment and assessor-learner discussion or review.

Simulation may be used where real-work ‘in vivo’ observation is not possible. Simulation must be as close as possible to the real-work environment, and will involve a competent actor interacting with the learners / candidate under observation by the assessor. A suitable background ‘script’ and behavioural guidance will be provided to the actor.

Assessment must be accompanied by feedback to learners about their performance, the evidence they submit, and what needs to be achieved to reach the required standard. The feedback should be given early and promptly so that learners are able to respond within the timetable of the course or programme.

Assessment procedures should include:

- collation of evidence for assessment through the lifetime of a learner’s programme,
- opportunities to re-present materials or re-do observations,
- collection and presentation of evidence by learners or candidates including:
  - ✓ direct observation by the assessor,
  - ✓ samples of work done in hard copy (for example case notes, reflective statements),
  - ✓ online or electronic collection of evidence through text, video, audio;
- records of trainer feedback and learner-trainer discussions,
- evidence (such as personal signature, managers’ confirmation, tutors’ observation) that the evidence is original to the candidate,
- provision for independent review of the assessors’ conclusions
- provision for appeal by the learner against maladministration or unequal or unfair dealing.

In many countries and vocational or educational qualification regimes there are a legislative requirement to:

- study for a minimum set period of time,
- sit examination(s) using essays, multiple choice questionnaires, theses,
- achieve a fixed standard of education, such as a higher degree, a recognised professional qualification.

These requirements do not necessarily indicate ability to apply the skills taught in the STEP programme. However, the STEP programme and its quality criteria may be fully implemented within a course that meets these requirements.

Respecting the autonomy of different qualification regimes, promoters of courses that employ the STEP programme should:

- award STEP certificates to learners who have been assessed under STEP quality controls in addition to any other qualification; or
  - incorporate STEP quality controls within other qualifications
- and in either case they should apply a valid assessment of competence measuring actual performance against the learning objectives of STEP.

### Quality Assurance and Evaluation of the course

The quality of the learning and teaching environment and activities can be assessed by:

- the quality of delivery of the course,
- the resulting change (in the direction of the learning objectives) in behaviour and competence of learners.

### Quality of delivery

The quality of the delivery and learning environment is high when it includes a set of behaviours and learning activities that enable learners to explore, understand, make choices and practice skills until they achieve mastery and competence.

Appendix 5 provides a table of Quality Assurance Factors that may be used to evaluate the delivery and learning environment.

### Behavioural change

Course evaluation should be clearly linked to the training objectives.

Evaluation should compare circumstances before and after the programme, and ideally will test whether the learning has transferred to work practices sometime after the training is complete.

Observation of learners in real-life and work settings presents problems of organisation and confidentiality, and may not always be achievable. Good substitutes would be

- observation in relevant simulations, which may be done over a duration of a course. These may be carried out by trainers applying objective behavioural standards and recording their findings,
- self – report by learners of their confidence to carry out specific aspects of the work, before and after the training.

In an ideal situation each skill would be evaluated in this way; however, the burden of form-filling may be reduced, and hence greater response rates achieved, by asking for self-evaluations of confidence to apply groups of skills.

Observations should be accompanied by concrete examples of skill- or behaviour-change.

The evaluation should contain:

- scales (e.g. Likert scales) to allow pre-post and inter-course comparisons,
- text or verbal answers to specific questions, and
- open questions.

Evaluation should happen before, during, and after training.

Evaluation responses will be provided by:

- learners,
- their employers and managers (where relevant), and
- trainers.

Trainers should have information on the evaluation-improvement cycle and their role in it. They will often be leading players in the evaluation process, but objectivity of the evaluation should not be compromised by their position.

The training materials should contain the correct evaluation forms and instructions to employers, learners and trainers on how and when to use them.

The best evaluations will employ blind cross-over studies of learners' achievements, ideally with randomisation. In designing such studies, care should be taken:

- memory, learning and order effects on the responses to earlier and later evaluation forms should be considered: the impact of a prior event on a subsequent event can be significant;
- carry-over of learner response evaluations from one course to the next should be minimised by having a sufficient gap between trials;
- follow-up evaluations some time, probably at least one month and as much as six months or a year, are desirable to evaluate long-term changes;
- evaluation scales and questions need to be tested and validated before use.

Support for development of courses

Many of these criteria for quality in STEP courses will be familiar to established skills-training organisations. Other educators may find the emphasis on skills and human interaction, outweighing theory and procedure, unusual and difficult to fit in established practices.

The application of e- and distance-learning also presents problems: e- and distance-learning methods promise solutions to access to course materials, provide new possibilities for group learning, opportunities for observation of skilful practice and other benefits. But they are not yet able to offer technologies that fully replace human

guidance and interaction. The trainer, in person, working directly with learners and their employers, will remain an essential element in skill development.

For many providers of courses, it is likely that trainers with sufficient experience in all these areas will be hard to find. STEP Project Partners can help with the preparation of trainers and the construction of curricula. We recognise that perfection can be a desirable but distant goal in the effort to improve what we already do for disadvantaged unemployed people. This document has laid out the standards that will enable training providers to come as close as they may to developing advisors who are skilled in the support of job seekers and employers. We continue to welcome enquiries, and to offer help to any who wish to implement the Programme.

# Common problems, FAQs

## Trainers and training

***I am an experienced adult trainer, but not an employment advisor.  
Can I teach STEP?***

STEP trainers need to have sufficient experience of employment advice *applying the range of skills listed in the curriculum* so that they can help learners solve problems, answer questions and provide relevant demonstrations and examples. So without this experience it will be difficult to achieve the quality standards.

***I have experience as an advisor, but have not trained adult learners before. How do I get started in STEP?***

If your experience as an advisor gives you a fluent competence in the curriculum, it should be possible for you to teach STEP skills. But you should seek guidance and practice in creating and managing the learning environment and helping groups and individual learners before you begin.

***Do I have to teach every Unit separately?***

No. In practice the ‘Advisor’s Toolkit’ Units (Units 6 to 12) apply to all of the ‘Client’s Journey to Work’ Units (Units 1 to 5) and it will be usual for you to develop the training so that learners acquire the skills of the Toolkit while practicing the skills of the Journey. The important thing will be to take care that the learning goes in easy stages from simple examples towards mastery of complex situations.

***Can I teach several Units at once by using practical exercises?***

Yes, and this will be the usual way to do things. Remember however that it is possible and desirable to illustrate and demonstrate the most basic skills using quite simple examples. Complexity is not helpful until learners have mastery of the topic being taught.

### ***The curriculum includes notes about required 'Necessary prior ability, learning or experience' for each Unit. Why?***

This is because some of the skills are needed to be able to do the later ones properly. Without the first skills it is not possible to relate to the client in a way that allows the later one to be effective.

For example, Unit 6: Interpersonal communication skills is necessary for advisors to learn how to carry out a trusting personal advice session with a client; they cannot do Unit 7: Planning, without those Communication skills.

In many training courses it will be possible for the two Units to be taught together (or in combinations with other Units). Equally, advisors who are already skilled in Communication would not need to learn it again before studying Planning. But it would not be right to teach Planning on its own to someone who does not have the required Communication skills.

### ***Why should I stick so closely to the curriculum? Surely there are other important things to learn, and other techniques to practice?***

The curriculum has been created to include both teaching methods and skill content that conforms to our best understanding of the evidence. So changing, or adding other things has some risks as well as some benefits:

- the main risks are that learners:
  - ✓ may acquire inappropriate working methods and behaviours through substitution of course content by other content,
  - ✓ will spend less time than they should on skill practice, their time being used up due to substitution,
  - ✓ will suffer reduced confidence because of the use of inappropriate learning techniques,
  - ✓ may be assessed on skills other than those required for the occupation, such as essay-writing, knowledge or examination skills.

Benefits, which can easily be added to STEP can include:

- improving local labour market awareness,
- adding important knowledge and experience of legislation and welfare provisions,
- deeper understanding of the theoretical and evidence base,
- working practices adapted to the needs of particular groups such as disabled people, migrants, and others.

### ***How many learners can I have in a course? How many trainers will I need?***

You need to be able to observe and give good quality feedback to the learners, and to provide guidance to individuals and to the group. In face to face teaching that probably means a maximum of five or eight learners per trainer; trainers also benefit from support, so two with a group of ten to sixteen is about right. Conditions are different in distance- and e-supported learning. Here it may be possible to demonstrate and lecture larger



numbers; but the provision of feedback and personal support remains will still limit the number included in active training events to about five to eight per trainer.

Smaller groups present their own problems: a group with fewer than four learners finds it difficult to have a diversity of experience and range of micro-skill practice partners, and learning is limited.

### ***Which is best: groups of advisors from different organisations, or just from one organisation?***

Both are good in different ways.

Having learners from one organisation lets you make best use of the Learning Needs Analysis to create a course aimed at specific skill development and transfer of skill to the workplace. But it may be harder to break away from previously acquired attitudes and procedures.

Having learners from different organisations creates a good sharing of ideas and experience between learners, and brings different examples. This helps show how the STEP skills are common to different client groups. But it is harder to tailor a mixed course to one organisation's developmental needs.

### ***Can we mix the experience levels of advisors within a learning group?***

Yes, but be careful. There is not yet much experience to be definite about mixed-experience groups. We have seen some examples work well, with good rapport and mutual support during learning. But we also feel that there are risks: advanced learners may be bored or even undermined by being in a group with new learners, though on the other hand they may find it helps them refresh their practice. New learners may feel intimidated, and might even be misled by more experienced learners. Use the Learning Needs Analysis and talk to the learners to plan carefully.

## **e-learning**

### ***Can the STEP course be done wholly by e-learning without any trainer input?***

No. The technology is not yet advanced enough to provide finely-adjusted demonstrations, feedback and personal guidance.

### ***Can I use video to do demonstrations?***

Yes, and it can be a good use of time and effort. Be careful that the video shows the actual learning point to be demonstrated.

### ***Can the online conferencing ('Big Blue Button' in Moodle) replace classroom teaching?***

Our experience of the conferencing technology is that it does not yet have the accuracy, fine detail, spontaneity and interactivity of good classroom teaching. Use it to replace lectures, watch videos, have short discussions, but do not use it for interactive role play. Or not until it reaches a new higher level of realism and is available to all learners.

### ***Can I use any learning software or does it have to be Moodle?***

Yes, other learning software can be used. Just be sure that it is accessible, easy to use and conveys the learning points well. The Quality Manual will help you.

## **Employer engagement**

### ***Will my local employers be willing to join in a training event? How?***

You can get two kinds of employers involved:

- those who provide employment advice services. Their staff can be your learners. They are just as busy as any other employer so it may take some time and work on your relationship to encourage them to take part;
- other employers in the local economy. Visiting them, to look at real workplaces, do job assessment and hear about their working environments and needs, is a very valuable part of the training. Your learners can be a good source of contacts, and learners should be encouraged to use social, personal, family, work and professional contacts to get to know employers and involve them in the training. Our own experience is that friendly employers are not hard to find, and are quite pleased to have the attention.

### ***There aren't any jobs round here!***

This seems to come up in most training courses, but more so when unemployment is rising, in areas of economic decline and closures, and in rural areas. All these things create problems for job seekers, no doubt. But a large proportion of any total area workforce leaves work each year, just as many join it. Job turnover can be as much as 20 percent or more of the total in work. So the issue is not so much about there being jobs, as about there being jobs in the right place (or workers looking for work in the right places) or jobs that an unemployed person feels skilled to do. Trainers should be ready to turn this objection to the effectiveness of employment counselling into an exercise for their learners in finding out how many vacancies get filled each year.

## ***Surely it is only the big/small/low paying employers that take on unemployed people?***

We have very little information about who is most ready to give employment to the most disadvantaged people, though we do know that one form of disadvantage is the prevalence of low wages among some groups of workers. But when it comes to positive help, our experience is that friends can be found in all sectors.

## **Evaluation**

### ***How can I show the employment service provider that STEP is working for them?***

Ideally you would use divide your learners into two groups at random, and teach each separately, one after the other, so that you can compare the impact with the ‘no-training’ alternative. Depending on the measures you use and the careful design of the evaluation, this gives you a true measure of impact that will stand up to critical scrutiny.

But this may not be achievable for operations and organisational reasons or because the numbers are not large enough to give a valid comparison. In that case you need alternatives.

- Observation of learners before and after training can give you a picture of their changed skills. There is a risk that the act of observation, by trainer or by skillful mentor or supervisor, influences the behaviour of learners. But that can be a good thing: if the prior observation is done without the learners knowing the skills under observation, they cannot be unduly influenced; after training, influence is likely to be in the desired direction, towards STEP skills, and so although not unbiased would tend to encourage transfer of skills to work. Observations are best carried out at work, and after some delay following training.
- End-of course evaluation can be useful, but is difficult to control. Some of the problems are:
  - ✓ Self-evaluation by learners’ of their own skills is useful but they tend to give themselves high scores. Consider asking questions that detail different skills rather than overall impressions, and questions that give an opportunity to express their need for more practice to reach perfection.
  - ✓ Use questions that ask about confidence to use skills – Self-efficacy questions – as they have been shown to be predictive of performance and persistence.
  - ✓ Appreciation questionnaires (‘happy sheets’) about the quality of teaching and course provision almost always show very high scores regardless of what is taught, and have limited value.
  - ✓ There is always a risk that learners give themselves high scores and positive remarks as a matter of courtesy.

- Pre course questionnaires allow measures of change but have their own problems:
  - ✓ untrained learners cannot yet judge their own abilities in skills they do not have;
  - ✓ experienced practitioners tend to give themselves high pre-scores, which limits the range available for measuring change.

### ***Can I use results, such as people getting work, to evaluate the training?***

Outcome measures, such as number of clients attaining work before and after training, and with and without the training can be used. However, there are many other variables in play, and skilled researchers should conduct such studies independently of the trainers, advisors and service managers. Properly done, such studies can offer a very high level of verification of the training, but the time and cost can be high. Poor evaluation design can lead to misleading results, both in favour, and against, the training. Some of the problems to be resolved include:

- matching of samples of clients to ensure true comparability,
- influence of the evaluation process on the outcomes,
- influence of the evaluation on behaviours other than those affected by the training,
- changes in the labour market during the period of study,
- changes in the client group,
- changes in legislation,
- changes in other aspects of the service provision.

## **Observation of skills**

### ***How can I observe learners' skills at work?***

You will need the agreement of the learners' employer, and also permission from each client involved. Clients have the right to refuse permission, or to withdraw permission, without giving a reason. This includes group sessions, telephone conversations and face to face meetings.

When you have permission, you should observe with the absolute minimum of interruption to the client-advisor interaction. Interruption or participation is only permissible when there is a clear and immediate danger to the people involved. In all other circumstances, the role of the observer is to observe the performance and skills of the learner-advisor, and provide feedback on their assessment afterwards, without the client present.

### ***Surely client's opinions about advisors' skills matter?***

Yes they do. But it is for the employment service to manage feedback from clients; a trainer from outside the service risks interfering with the professional relationship between advisor and client if they seek a client's opinion.

### ***What about client confidentiality?***

Clients must be made aware that the observation and assessment will preserve their confidentiality just as if the observer/assessor were not present:

- if by chance some personal association or prior contact exists between observer and client, the observation can only proceed with the explicit permission of both;
- names and personal data will be removed from any record and not be retained or conveyed to others outside the normal advisory process;
- clients may ask that any or all of the discussion be removed from any record, even if anonymised;
- clients may halt the observation at any time;
- clients should be told the circumstances under which disclosure may take place: these are usually risks to personal safety and property, and acts outside the law.

### ***Can I use role play or simulation instead of watching real work?***

Yes. Carefully planned role plays can give a very good indication of learners' skill.

Role-plays can be used

both as teaching aids and as assessment tools, but there should be a clear understanding and usually a division between the two uses: Learners should be able to experiment during teaching, and should be in as real-world' setting as possible during assessment.

It can be difficult to arrange role-play for observation of complete interviews in a classroom setting: time constraints and the observation by other learners may make it unreal.

Ideally, a competent actor can provide the desired opportunities for observation, using a suitable script from which to improvise their role as client.

## Curriculum

### ***I want to make a course with the whole STEP curriculum, but it looks too big.***

It is big! If you need to teach an advisor from the very beginning, you will need time for classroom (or equivalent) practice, some study (but not high academic talents) and time too for reflection and practice. So it would be sensible to expect the course to cover a span of time and use several learning modes. It is OK for learners to progress gradually through the curriculum.

If you are increasing the skills of existing advisors, a Learning Needs Analysis should tell you where you need to concentrate, and how much time to devote to each Unit.

### ***Can I pick just some of the Units to teach?***

Yes. Use a Learning Needs Analysis to help you decide what is most important. This option is useful when advisors start to work in a new field of advice – for example working with employers for the first time – but usually you will want to include opportunities to review and enhance the ‘Advisor’s Toolkit’ Units because they are needed for any stage in the ‘Client’s Journey to Work’.

### ***Can I teach part of a Unit?***

Yes, provided the Learning Needs Analysis has shown you that the learners have already mastered those skills you wish to leave out. The Learning Outcomes in the curriculum can help you decide, and to revise if the actual training events show something different.

### ***How do I know which Units are most important?***

The Learning Needs Analysis should tell you what your learners need to do, and from that you can work out the Units (and parts of Units) that they need to study. The Knowledge, Skills and Competencies in the curriculum may be used in the LNA.

### ***There is not much theory or reading: how will learners understand the basics?***

STEP is a skills-learning course. It does not seek to develop a full understanding of theory, legislation evidence and policies. So the emphasis is on doing things. But reading and study helps learners, and some people find it helps skill development to have some basic knowledge first. Others prefer to practice first and get the reading and reflection during and after. To accommodate both you must:

- explain the reasoning behind each skill; but you can do this in discussion, presentations and classroom settings just as well as through private study,
- demonstrate the skill you are teaching: this is essential as it helps learners see and do the right thing, whereas reading alone can lead some towards mistaken practice.

So learners can get ‘the basics’ for understanding their skill from active course work as well as from reading and private study.

If you want texts to help students learn, we recommend the STEP publication ‘Employment Advice for Disadvantaged People; What works’ which provides an evidence review and a substantial reading list<sup>7</sup>.

### ***We do things differently here: our services require advisors to act differently from STEP***

STEP is based on evidence of what works to help disadvantaged people into work. It also adopts an ethical judgement about the right of clients to make informed decisions about their own lives and labour-market choices.

In practice, the STEP skills and the STEP ethical position have been found to be helpful to advisors and clients from widely differing legal and practice backgrounds, and minor disagreements have been the source of useful discussion and learning.

But if there are insurmountable and fundamental differences – such as *might possibly* be introduced by some extreme requirements of welfare-to-work programmes, or by over-zealous reliance on computer system to replace personal counselling (other examples are possible), then STEP will not be appropriate. We would argue that such systems are wrong in themselves, but such a discussion is not a matter of how the STEP curriculum is applied.

## **Costs and copyright**

### ***Can I implement and offer STEP training by my organisation?***

Yes. The STEP training and curriculum have been made available for general use. There is no restriction on how you or anyone delivers services that include the STEP materials for training implementation. But you cannot sell the originals, and if you want to distribute the originals you must get permission from the authors or project partners.

### ***Can I sell the STEP Handbook and related materials?***

No. Under the terms of the Erasmus+ grant given to the STEP project, the STEP Handbook and related materials are all available at no charge. Copyright is held by the authors and project partners. People who want to have their own copies should be directed to the project partners.

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<sup>7</sup> Available from the project partners.

***Can I use the STEP exercises? Do I need permission and is there any fee?***

There is no fee for using the STEP exercises and other STEP materials. You do not need permission, but you must

- acknowledge the STEP Programme in your materials, and use the STEP logo alongside your own
- let the partners know that you are using the STEP programme
- contact the partners with any questions about STEP, so that you can get the best out of it and give feedback to help improve.

***Can I publish my own training course?***

Yes, and there is no fee. STEP, ERASMUS+ and the authors must be acknowledged in your publication, whether it is in print, electronic or any other medium.



## Guide to resources online (sample exercises etc)

The STEP moodle site at <https://moodle.skillstep.eu/> has a section containing **Files with exercises to support STEP training courses**. They may be downloaded or used online.

Within that section there is an excel spreadsheet called 'STEP guide to Applicability of exercises in the repository' which provides a quick reference guide which will help identify exercises suitable for use in the various course Units. Many exercises are suitable for use in more than one Unit.

# Appendix 1.

## STEP Learner Guide

### About this Guide

This Guide describes the processes and regulations governing your participation in enrolment on the STEP Programme.

It describes how the Certificate is structured, your rights and responsibilities, and the roles of the organisations involved in its delivery.

### Please complete and return the registration form in Appendix 1 to [a relevant authority]

Complete this section according to the local or national conditions that apply. Three organisations are involved in providing the Certificate.

[A] is responsible for training, one-to-one support and assessment.  
Your contact is [....]

[B] is the organisation responsible for overseeing the standards of the programme and ensuring that assessment is carried out to the level required. You should not normally need to contact [B ], unless you wish to lodge a complaint or appeal about a matter you cannot resolve with [A]. The contact is [....].

[C] organisation that awards your certificate.

### Programme Overview

This course is the [nation or locality] version of the **STEP Certificate** developed through the STEP project.

The Certificate is [insert your own named qualification] (level [insert level] in the European Qualifications Framework).

The STEP Certificate is a work based qualification for people involved in supporting disadvantaged people into work.

The Certificate requires you to be competent in several learning Units which are described below.

Competence is shown by evidence of work or by skill demonstration, supported by other materials. You may choose to be assessed on your existing skills, or may take a STEP training course before your assessment.

## Registration

[insert registration requirements and add any forms at Appendix 1]

## Induction

[insert your induction policy covering at least the following:

- the training to be provided,
- the assessment requirements and procedures,
- organisational policies and procedures,
- roles and responsibilities,
- support to achieve the qualification,
- access to tutors and resources,
- health and safety,
- how individual learning needs will be met].

## Programme Methods and Timetable

[insert information on:

- distance learning,
- face to face learning & attendance,
- in-work practice,
- the proposed timetable,
- time limits].

## Assessment and certification

In order to achieve this qualification all must be achieved by providing work-based or other concrete evidence and explanations that show that you meet the competencies for each of the Units.

Ability in Competence and in Skill are measured on the STEP EQF Competence and Skill Scale:

- Not demonstrated.
- Demonstrated in simple simulation.
- Demonstrated in life-like simulation.
- Demonstrated in real work setting.
- Prior ability demonstrated.

Ability in knowledge are demonstrated on another – the STEP EQF Knowledge Scale:

- Not demonstrated.
- Demonstrated in learning group discussion or tutor review.
- Demonstrated by own presentation and review via case study.
- Demonstrated by review or analysis of complex real-life situation.
- Prior understanding evidenced.

Your tutor/assessor will provide guidance about what evidence is needed for each unit.

Keep the materials you are using for assessment in a portfolio, and reference them to the units and learning outcomes that they are relevant to.

There are templates that you can use to cross-reference your materials to the assessment criteria for each unit in Appendix 3c.

Following assessment, you will be provided with written feedback and, when you have achieved the Certificate issued with a certificate.

## **Plagiarism / Malpractice**

Whilst group discussion and review of working practice is encouraged, any group or collaborative work used towards assessment needs to state clearly the role you have played in it. Similarly, you must acknowledge anyone else's work (published or otherwise) that you have included in your assessment evidence.

There is a full copy of the plagiarism/malpractice policy in the appendices.

## **Candidate Appeal Procedure**

If you disagree with an assessment decision the first course of action you should first discuss the problem informally with the assessor and reach an amicable agreement, or gain an understanding of the decision.

If you have grounds for feeling that an assessment decision is unfair or incorrect you may appeal against it to [...]. See the policy and procedure in the appendix for further details.

## **Complaint Procedure**

You can make a complaint if you feel that you have been treated unfairly, discriminated against, or bullied. We would take this very seriously, and the procedure for investigating the complaint, and acting on the outcome, is in the appendices.

## Health and Safety

Health and safety on activities covered by the programme is the responsibility of you as the candidate, your employer, and [...]. [insert your organisation's policy] in the appendices.

## Equal Opportunities

We are fully committed to ensuring the equality of opportunities to all our candidates and staff. [insert your organisation's equal opportunities policy in the appendices.]

## Learning Units

The STEP learning Units are in European Qualifications Framework format.

The following tables show the content of each unit. This is the specification against which you will be assessed.

Competencies are the activities for which you must be able to take some responsibility in your work. The Knowledge and Skills describe those things that you must do to achieve in order to reach that Competency.

All the Competencies for a unit must be achieved for the unit to be certificated. To achieve a learning outcome, you must demonstrate its Skills and Knowledge. If this is difficult to do using evidence from your workplace, discuss it with your assessor to see if there alternatives – such as using realistic simulations or discussing what you have done or would do – that are acceptable.

STEP EQF Knowledge, Skill and Competence Learning Outcomes; see Appendix 2 of the Handbook

## Learner Guide Appendices

Appendix A Sample Learning Agreement / Registration Form

**Please print and sign this form and the attached Agreement, and return to [...]**

Please print clearly

*Full Name		* Male / Female
------------	--	-----------------

Name to appear on certificate if different from above

*Date of Birth (date/month/year)	NI number (for public funded programmes only)

*Address for correspondence	*Employer address
*Tel.	
*Email	

Learning Support / Special Needs (if applicable)

I have received and read the notes below ('Learning Agreement') and the student handbook for this programme and agree to the requirements set out in them.

*Employer's signature (for employer supported programmes)	
*Candidate's signature	

Signatures are essential and show agreement to abide by obligations and responsibilities set out in the Learning Agreement.

## Appendix B. Learning Agreement

### Aims and Objectives

The STEP Certificate will provide work-based certification for practitioners in employment guidance directed at people who face labour-market disadvantage.

It is designed to reflect evidence for effective professional practice and to be relevant and accessible to practitioners in different national systems and traditions. The certificate is open to new as well as existing practitioners; assessment is work-based, so candidates for the Certificate will need to have appropriate practical evidence of skill, preferably based on real work experience, to complete. Candidates will normally go through a programme of training before they can be assessed. However, the Certificate is designed so that practitioners who already have the necessary skills and experience can be assessed directly.

### To take this award

All candidates must participate actively in learning and assessment arrangements and to gather appropriate evidence to meet the assessment requirements for their selected units as negotiated between them, their employer and [.....] who will be delivering and assessing the qualification.

#### Learning Agreement

All training and development required to reach the standard for assessment for this qualification will be provided to candidates by [...].

A STEP training programme is delivered through a series of events, workshops, online materials and work based mentoring as required and agreed between candidates/their employer and [...]. This programme covers the learning outcomes and assessment criteria and meets the individual learning plan of each candidate. Support and feedback on assessment will be given by [...] in order to support each candidate to achieve the Certificate.

### Following enrolment

[...] will induct candidates to the qualification and its assessment requirements and provide one-to-one support. Candidates will have opportunities to discuss their particular learning requirements with [...] if not already identified within this form. Each candidate's learning plan has been developed through the Learning Needs Analysis that has been conducted by [...] with individual candidates/their employer and agreed with them.

Candidates will be expected to attend and participate in learning events, and engage with supporting materials workshops and assessment activities as agreed with [...].

[...] will give feedback following assessment, including further guidance if the work does not yet meet the assessment criteria. Once final assessment has taken place [...] will submit files to [...overseeing body or accrediting authority] for verification. On successful completion files will be returned to the candidates by [..].

## Assessment

Candidates will be responsible for ensuring that they have the evidence required for assessment, using the procedures and forms supplied by [...] and any other materials they find relevant. Candidates need to complete the case studies, interview transcripts, (simulated or real) interviews and assessor discussions as required to meet the Competence criteria, as guided by their assessors. Candidates must submit evidence within the required time frame. If circumstances require, a reasonable extension of time may be discussed with [.....].

[...] assessors are approved by [.....approving body ...].

All assessments will be verified through [... relevant national quality assurance processes...] in addition to assessment against the STEP Competence criteria. Any consequent requirements for additional evidence or assessment will be discussed with the candidate. When achievement of the qualification is approved, a certificate will be provided.

All candidates are required to keep their evidence file [insert time of retention and right to review evidence and standards policy].

All candidates have the right to appeal to [...insert appeal body...] if they are concerned that the assessment has not been carried out properly and fairly.



## Appendix C. Assessment Procedure

### Skills assessment

The STEP Programme is concerned with the acquisition and demonstration of skills to act as an advisor to clients and employers. Assessment for competence is to be shown by performance of those skills. Learners / candidates will present concrete evidence for the assessor to judge their competence to work in real-life advisory situations.

The Knowledge, Skills and Competence statements in each Unit will provide the standards used in assessing competence.

A STEP programme assessment begins when the candidate supplies the first piece of evidence and is complete when the last piece has been provided and the assessor has reached conclusions about competence in each of the modules and provided feedback to the candidate.

Candidates are not required to wait to collect or submit evidence, though they may do so if their course and work make it appropriate.

Assessors may ask candidates to send or make available their evidence at convenient times, and to avoid delay.

Candidates are not required to attend training in order to submit evidence of competence.

The STEP Programme is not assessment of ability to:

- pass examinations consisting of answers to set questions,
- carry out academic study,
- present research or other academic papers,
- participate in training for any set period of time,
- have any specific attendance record at a training course,
- write, other than writing necessary to the job: for example case histories, case records,
- manipulate other than very basic statistics;

and these criteria, while they may appear in other related qualifications, are not to be considered in evaluating a candidate's competence for a STEP award. These abilities will undoubtedly help learners to acquire skills and express themselves. But they are not the object of assessment, and learners should be provided with every opportunity to demonstrate the target skills without being hampered or misjudged on account of a lack of academic fluency.

Learners will be asked to present evidence of their ability, and so will need to compile evidence statements and case studies, and will need to interact with the assessor while a critical evaluation of their ability is undertaken. Learners who are not familiar and comfortable with such procedures may find it difficult to organise and present the evidence, but still possess the necessary skills.

Tutors and assessors should provide support and guidance to enable learners to present their best evidence, while not providing the evidence for them, using the assessment procedure neither as remedial teaching nor as a substitute for genuine self-generated evidence.

## **Methods of assessment**

The STEP Programme methods of assessment are those which best enable the assessor to judge real-life competence of the candidate. They will include:

### **In vivo assessment**

Observation of candidates ‘at work’ with employers and clients is the most desirable form of assessment because it gives direct evidence of skill in use in a real-life setting.

Video and audio recording of good quality may be used in addition to in-person observation.

In vivo assessment must be accompanied by the written consent of the client or employer, or their legal guardian as the case requires. The information and forms for seeking consent must include explicit guarantees of confidentiality.

### **Use of simulation**

Simulation may be used where real-work ‘in vivo’ observation is not possible. Simulation must be as close as possible to the real-work environment, and will involve a competent actor interacting with the learners / candidate under observation by the assessor. A suitable background ‘script’ and behavioural guidance will be provided to the actor.

Simulation may be used to identify specific items from the Skills Outcome statements and Quality Assurance Frameworks, but if this is done there should also be at least one simulation of a complex or comprehensive demonstration of skill in a more life-like setting.

### **Case studies**

Case studies may be provided by the candidate to provide additional evidence of

practice and of their understanding and reasoning during practice. Case studies may be evaluated as is or with the addition of an assessor-candidate discussion or review.

## Assessor Review

On completion of the submission of evidence, the assessor may choose, or the candidate may ask, to review the candidate's submission with them in a formal review. The assessor and candidate will be able to:

- clarify understanding of the evidence,
- add interpretation of the evidence,
- check the suitability of the evidence for application to the various Knowledge, Skills and Competence statements,
- decide what additional evidence may be needed.

## Assessor duties

Assessors must:

- ensure that the evidence they assess is original to the candidate. A candidate's signature with witness from their manager or other person in a position of authority is usually sufficient.
- Observe the evidence themselves in person.
- Apply the Knowledge, Skills and Competence statements.
- Record their findings in the forms provided.
- Provide their written conclusions on the forms provided to candidate and if requested by the candidate to their tutor(s).
- Provide feedback to candidates at each stage of assessment to help them:
  - ✓ develop plans to tackle areas of weakness,
  - ✓ understand where additional evidence is needed,
  - ✓ work out how best to get and to present evidence.
- Provide general, not individual (unless requested by the candidate), feedback to tutors and course designers.
- Avoid overlap between teaching and assessment duties, and where it does inevitably occur there must be:
  - ✓ opportunity for candidates to request a second opinion independent of the tutor,
  - ✓ review of the work of assessors by external independent qualified person.

## Use with other Qualifications

In many countries and in different vocational or educational qualification regimes there is a legislative requirement to:

- study for a set minimum period of time,
- have a certain level of attendance,
- sit examination(s) using essays, multiple choice questionnaires, theses,
- achieve a fixed standard of education, such as a higher degree or a recognised professional qualification.

These requirements do not necessarily indicate ability to apply the skills taught in the STEP programme, unless the programme and its quality criteria are fully implemented within a course.

Respecting the autonomy of different qualification regimes, promoters of courses that employ the STEP programme should

- award STEP certificates to learners who have been assessed under STEP quality controls in addition to any the requirements of other qualification, or
  - incorporate STEP quality controls within other qualifications or
- and in either case apply a valid assessment of competence measuring actual performance against the learning objectives of STEP.

## Prior learning and ability

People who are competent in using STEP skills may be assessed for a STEP certificate, as defined above

- separately from any other qualification or assessment
- within another qualification or assessment provided STEP criteria are met
- without additional training where they are able to present evidence for assessment showing that they already have the necessary skills.

The holding of another qualification or a particular post or job do not exempt applicants from the assessment requirements of STEP.

# STEP Evidence and observations

<b>Evidence and observations submitted</b> [This form or one similar should record all the materials submitted by the candidate. Notes on the quality and relevance to Knowledge, Skills and Competence statements should be recorded here.]			
<b>Training Centre:</b>			
<b>Dates: from</b>	<b>to</b>	<b>place</b>	
<b>Examination number</b>	<b>Examiner</b>		
<b>Candidate:</b>			
<b>Title</b>	<b>First name</b>	<b>Last name</b>	
<b>Reference, date</b>	<b>Description</b>	<b>Notes</b>	
	<b>Real-life Observation(s)</b>		
	<b>Simulations / role play(s)</b>		
	<b>Case study(ies)</b>		
	<b>Review with examiner</b>		
	<b>Other(s)</b>		
	<b>Prior learning &amp; experience</b>		
<b>General Remarks</b>			
<b>Examiner Signature</b>		<b>Date</b>	

# STEP Assessment record

<b>STEP Assessment record</b> [This form or one like it should be used to record the evidence submitted against the Learning Units (1 to 12). Assessors should make reference to the Knowledge, Skills and Competence statements.] <b>Candidate name:</b>		
<b>Unit</b>	<b>Evidence provided, with comments in relation to Skills Outcome statements and Quality Assurance Frameworks</b>	<b>Date when Unit Standard is met</b>
1. Clients' beliefs about work		
2. Choice of Occupation		
3. Finding a job		
4. Competing for work		
5. Keeping the job		
6. Interpersonal communication skills		
7. Planning		
8. Developing clients' self-efficacy		
9. Design & application of group events / learning		
10. Developing advisors' own Labour Market resources		
11. Ethics		
12. Theory		
<b>Examiner Signature</b>	<b>Date</b>	

## Appendix D. Plagiarism / Malpractice Policy

Malpractice (including plagiarism and cheating) must be reported to [...relevant authority ], by whom it will be investigated.

The procedure for investigating suspected malpractice is as follows

[ insert official procedure for investigation and action:

- responsible person,
- record keeping,
- forms to be used,
- independence of investigators,
- speedy / prompt action,
- co-operation by staff and candidates,

procedure:

- allegation,
- official response,
- investigation,
- report,
- decision,
- appeal...].

## Appendix E. Health and Safety

[insert organisational Health and Safety Policy ....

- organisation,
- trainers,
- learners,
- employers involved,
- premises,
- risks and risk assessment,
- reporting,
- insurance...]

## Appendix F. Candidate Appeals Procedure

The first step in any appeal should be to discuss any problem informally with the assessor and reach an amicable agreement, or gain an understanding of the decision.

If a candidate is not happy with an assessment decision, they must notify: [..... organisation..... timescale for notification ..... information to be provided ]

[.....] will speak to all the parties concerned and give a decision in writing within ..... days of the appeal.

If the candidate remains dissatisfied they may ask for [.....next stage of appeal....]  
[ ...procedure for next appeal ....]

## Appendix G. Complaints Procedure

If you need to complain, after discussing the issue with your trainer or assessor, you should write to [.....]. On receipt of this the following action(s) will be taken.

[policy:

- investigation,
- response time,
- response to candidate,
- agreement on action,
- recording...]

## Appendix H. Equal Opportunities Policy

[Insert organisational Equal Opportunities Policy:

- recruitment to programme,
- participation in programme,
- adaptations or adjustments required to enable individuals to participate,
- learner or candidate duties,
- appeal procedure...]



## Appendix 2.

# STEP EQF Knowledge, Skill and Competence Learning Outcomes

Relevant EQF levels for STEP are:

- For Knowledge: ‘L3 Knowledge of facts, principles, processes and general concepts, in a field of work or study or L4 Factual and theoretical knowledge in broad contexts within a field of work or study’.
- For Skills: L6 ‘Advanced skills, demonstrating mastery and innovation, required to solve complex and unpredictable problems in a specialised field of work or study’.
- For competence: ‘L4 Exercise self-management within the guidelines of work or study contexts that are usually predictable, but are subject to change; supervise the routine work of others, taking some responsibility for the evaluation and improvement of work or study activities’ or L5 ‘Exercise management and supervision in contexts of work or study activities where there is unpredictable change; review and develop performance of self and others.’

Choosing L6 for knowledge would bring the required knowledge-learning above the level necessary for skilled delivery of an expert employment counselling service. Choosing L3 or L4 for skills would reduce the skills required for successful assessment to below the level required for delivery of an expert employment counselling service. The level of responsibility and autonomy required for advisors working within a structured and well-managed organisational environment is quite well described by L4. Advisors working without structured and ethical organisational support, or who are providing some degree of supervision for others will need to be qualified to L5 or above.

For a standard implementation of STEP within a structured and ethical organisational framework, we recommend EQF level 4 as the minimum for the whole course. However, in practice, the recommended EQF level for the course would be L5 or L6 as this level is most common and appropriate for training programmes in an employment advice domain within national educational systems.

Organisations implementing STEP within their own national or organisational framework should take advantage of their flexibility to propose qualifications and assessment arrangements that reflect the balance of **knowledge, skills and competencies required of professional employment advisors.**

In the context of EQF	Knowledge is <i>theoretical and/or factual</i> .	Skills are <i>cognitive</i> (involving logical, intuitive and creative thinking), and <i>practical</i> (involving the use of methods, materials, tools and instruments)	Competence is <i>responsibility and autonomy</i> .
-----------------------	--------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------

Unit 1: Clients' beliefs about work	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. argue on the value of belief and confidence in supporting and also resulting from activity demonstrate understanding of factors that influence clients' beliefs including <ul style="list-style-type: none"> <li>– welfare provisions and active labour market policy</li> <li>– social environment</li> <li>– previous work history</li> <li>– personal confidence to achieve work</li> </ul> </li> <li>3. describe the relationships between disadvantage, employment and equality</li> <li>4. recognise the impact of health and disability on employment and vice versa</li> <li>5. list and elaborate on applicable rules on employment and welfare, employment programmes</li> <li>6. list the personal social &amp; monetary benefits of suitable work the local or relevant sectoral labour market operation: <ul style="list-style-type: none"> <li>– turnover of vacancies and jobs and related factors</li> <li>– recruitment methods in common use by employers</li> <li>– examples and types of jobs and employment sectors and related employee-competence requirements</li> </ul> </li> </ol>	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. ask clients the “right” questions about their beliefs, thoughts and attitudes to work and job opportunities</li> <li>2. explore clients' beliefs about availability of work and help clients identify sources of work or information</li> <li>3. encourage clients to express the benefit they would get from working and to assess the changes that employment would make to their personal circumstances</li> <li>4. explore clients' abilities and experience</li> <li>5. help clients to undertake their own activity to explore the labour market and alternative within or outside the labour market</li> <li>6. provide selective positive feedback about work</li> <li>7. challenge unfactual, erroneous or unhelpful beliefs in a supportive manner</li> <li>8. provide relevant examples of success in finding and keeping work</li> <li>9. consider any ethical conflict between personal choice and the demands of welfare legislation and programmes</li> <li>10. distinguish rumour from fact and makes decisions based on reasonably available evidence</li> </ol>	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. be responsible for developing clients' understanding of the value employment holds for them</li> <li>2. be responsible for carrying out work-focussed interviews with a range of clients, to <ul style="list-style-type: none"> <li>– explore their beliefs</li> <li>– encourage them to understand the operation of the labour market</li> <li>– develop beliefs and aspirations that are realistically achievable</li> <li>– enhance confidence to the level where concrete actions can be confidently undertaken.</li> </ul> </li> <li>3. work independently with clients in order to evince and develop clients' positive beliefs about <ul style="list-style-type: none"> <li>– the availability of work</li> <li>– the benefits of work in relation to their own specific circumstances and the available labour market</li> <li>– their own ability to work</li> <li>– the requirements (official demands, personal needs) and choices between welfare, unemployment and employment.</li> </ul> </li> <li>4. work independently with clients in order to help clients make choices and develop positive beliefs using <ul style="list-style-type: none"> <li>– personal interview</li> <li>– group discussion</li> <li>– supporting clients review their own experiences and priorities</li> <li>– labour-market related activities to develop their thinking.</li> </ul> </li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 8: Developing clients' self-efficacy  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics</p>		

	Knowledge	Skills	Competencies
<b>Unit 2: Choice of Occupation</b>	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. describe the local or relevant sectoral labour market</li> <li>2. list different types of employment contract</li> <li>3. explain the effect of personal wishes and choices on selection of work</li> <li>4. distinguish differences between job titles, job descriptions, occupational requirements and job tasks</li> <li>5. describe the impact of working environments on job choice</li> <li>6. describe the impact of non-work aspects of employment such as travel, clothing and others on job choice</li> <li>7. describe suitable uses and risks of proprietary careers advice systems and databases.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. help clients discuss and explore: <ul style="list-style-type: none"> <li>– available or possible jobs</li> <li>– suitable employers</li> <li>– suitable occupations, comparing alternatives</li> <li>– self-employment and partnerships, co-operatives</li> <li>– the social and physical environment of work that would suit them</li> <li>– the nature of possible employment contracts, including pay and conditions</li> </ul> </li> <li>2. help clients recognise, evaluate and value their <ul style="list-style-type: none"> <li>– experiences</li> <li>– qualifications</li> <li>– wishes</li> <li>– skills, talents</li> <li>– personal preferences</li> <li>– circumstances</li> </ul> </li> <li>3. help clients think about time-scales, longer and shorter term goals</li> <li>4. help client use their own information and contacts and sources to evaluate the availability of work in the local labour market</li> <li>5. develop self-assessment by the client by evaluation of their ability against employer, job duties, work environment</li> <li>6. encourage comparison of alternatives</li> <li>7. provide ideas or information that may be relevant to their decisions for clients to think about</li> <li>8. undertake only those formal test or assessment procedures that are supported by high quality evidence and which the advisor is qualified to administer</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. developing clients' ability to make realistic choices in the labour market</li> <li>2. conducting discussions and activities that <ul style="list-style-type: none"> <li>– help clients to make choices about a career and job</li> <li>– encourage comparison of alternatives regarding the availability of work in the local labour market</li> <li>– help clients choose occupations that are reasonably achievable in 'their' labour market</li> <li>– help clients undertake activities that facilitate job-choice</li> <li>– help clients to explore their personal ability, wishes and experience in relation to their job choices</li> <li>– support clients in considering employment options such as <ul style="list-style-type: none"> <li>o including short term or temporary work</li> <li>o self employment, entrepreneurship</li> <li>o work practice or experience</li> </ul> </li> <li>– apply suitable approaches to help clients make career choices by <ul style="list-style-type: none"> <li>o conducting personal interviews</li> <li>o leading group discussions</li> <li>o supporting clients review their own talents, desires, experiences and priorities</li> <li>o supporting clients to develop their experiences and information through labour-market related activities</li> <li>o supporting clients in their search for information</li> </ul> </li> </ul> </li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 8: Developing clients' self-efficacy  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics</p>		

Unit 3: Finding a job	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. demonstrate comprehensive factual knowledge of the labour market in terms of: <ul style="list-style-type: none"> <li>– networking</li> <li>– identifying information sources</li> <li>– listing job search techniques</li> <li>– researching the local or relevant sectoral labour market</li> <li>– understanding turnover of vacancies and jobs and related factors</li> <li>– listing recruitment methods in common use by employers</li> <li>– listing examples and types of jobs and employment sectors and related employee-competence requirements</li> </ul> </li> <li>2. acquire comprehensive factual knowledge of job search techniques.</li> <li>3. demonstrate knowledge of how and when to provide factual information so that clients can make good use of it.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. help the client identify the right labour market information for their job choice</li> <li>2. encourage development and use of client’s own networks of contacts and sources of information <ul style="list-style-type: none"> <li>– formal employment networks such as professional societies, clubs</li> <li>– informal contact networks such s friends and family</li> </ul> </li> <li>3. help a client with or introduce a job search management system including monitoring of <ul style="list-style-type: none"> <li>– contacts</li> <li>– approaches made and responses</li> <li>– sources of information on vacancies</li> <li>– jobs sought</li> <li>– opportunities found</li> <li>– action taken</li> <li>– evaluation of the suitability of each job</li> </ul> </li> <li>4. provide activity, training or experiences that enable the client to carry out effective job search using media which are new to them</li> <li>5. help client by providing labour market information and guidance to supplement their own search</li> <li>6. maintain active awareness of the local labour market</li> <li>7. help the client prepare and carry out a plan to resolve any domestic, transport, health, financial or other personal issues in the transition to work</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. developing clients’ ability to gather information, manage their own sources and activities in locating a job in the labour market.</li> <li>2. conducting discussions and activities that enable the client to <ol style="list-style-type: none"> <li>a. identify the right labour market information for their occupational choice and support their activities with realistic self- and labour market-evaluation</li> <li>b. find a job to apply for <ul style="list-style-type: none"> <li>– using various media</li> <li>– using personal contacts</li> <li>– using formal and informal networks</li> </ul> </li> <li>c. find out about the job: <ul style="list-style-type: none"> <li>– qualifications skills and experience needed</li> <li>– tasks to be done</li> <li>– social and physical environment</li> <li>– contract and pay</li> <li>– recruitment procedures</li> </ul> </li> <li>d. record progress and appreciate the need for persistence, maintaining effort over time</li> <li>e. enhance knowledge and review choices and experiences</li> </ol> </li> <li>2. maintaining professional relationships with employers to obtain job information and notification of vacancies, and for</li> <li>3. sharing information with team colleagues to enhance understanding about the labour market(s)</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics  Unit 8: Developing clients’ self-efficacy  Unit 10: Developing advisors’ own Labour Market resources  Unit 7: Planning</p>		

Unit 4: Competing for work	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to demonstrate:</p> <ol style="list-style-type: none"> <li>1. comprehensive knowledge of the labour market <ul style="list-style-type: none"> <li>– recruitment methods</li> <li>– networking</li> <li>– information sources</li> <li>– job search techniques <ul style="list-style-type: none"> <li>– the local or relevant sectoral labour market</li> </ul> </li> </ul> </li> <li>2. awareness of how to use cognitive rehearsal and practice to minimise performance stress and prepare for (inoculate against) failure.</li> <li>3. knowledge of how and when to provide factual information so that clients can make good use of it</li> <li>4. awareness (basic knowledge) of the use of psychometric and other formal test procedures by employers</li> <li>5. basic knowledge of recruitment and employment legislation in force</li> <li>6. knowledge of learning strategies to develop appropriate competitive behaviour in clients (e.g. networking, interview skills, test competence and others)</li> <li>7. knowledge of career information sources, labour market data and information.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. provide a variety of support to clients so that they are able to identify the methods, procedures and people involved in job selection even for unfamiliar occupations and sectors</li> <li>2. provide a variety of support to clients so that they are able to present themselves effectively in competitive applications that may involve <ul style="list-style-type: none"> <li>– correspondence</li> <li>– preparing a CV</li> <li>– formal or informal interviews and meetings</li> <li>– networking</li> <li>– social events</li> <li>– computer tests, vocational skills tests, psychological profiles, prepared presentations</li> <li>– dress codes and personal appearance</li> </ul> </li> <li>3. help clients undertake cognitive rehearsal of specific events</li> <li>4. help clients practice difficult aspects of the test or competition</li> <li>5. prepare clients for setbacks and continuing effort</li> <li>6. develop review, self-assessment and plans for developing skills to compete with clients.</li> <li>7. encourage resilience and persistence after a client’s failure to secure a job.</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. enabling clients to develop a personal action plan with a focus on work that covers all aspects of the competition for the chosen job and the personal preparation that may be needed</li> <li>2. providing clients with job competition skills through practice and training, including job application (interview etc) training, preparation, support and feedback</li> <li>3. supporting clients learning, practicing and involved in human networking as part of job competition</li> <li>4. supporting clients learning and practicing testing regimes used in job selection</li> <li>5. encouraging resilience and persistence after a client’s failure to secure a job</li> <li>6. encouraging proactivity in networking with employers</li> <li>7. encouraging cooperation with employers.</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics  Unit 8: Developing clients’ self-efficacy  Unit 10: Developing advisors’ own Labour Market resource  Unit 7: Planning  Unit 3: Finding a job</p>		

<b>Unit 5: Keeping the job</b>	<b>Knowledge</b>	<b>Skills</b>	<b>Competencies</b>
	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. understand the personal, social and occupational factors relevant to the transition from unemployment to employment</li> <li>2. demonstrate knowledge of employment legislation and work-induction practices</li> <li>3. demonstrate practical knowledge of work or task adjustment</li> <li>4. demonstrate awareness of available support and training services.</li> <li>5. demonstrate understanding of the importance of pace and stamina to work capacity, and knowledge of techniques to build work capacity.</li> <li>6. demonstrate understanding of the importance of social aspects of the working environment and life to integration, confidence and performance at work.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. help the client learn about the job and its requirements</li> <li>2. help the client prepare and carry out a plan to resolve any domestic, transport, health, financial or other personal issues in the transition to work</li> <li>3. review progress with employer and client during and after the transition, as required by circumstances, providing necessary support</li> <li>4. evaluate the need for job adjustments or adaptations with the employer and client, and arrange for their provision</li> <li>5. provide or find means to give in-work support during learning and in-the-job practice, time limited or not, according to need</li> <li>6. guide clients and advocates with employers where necessary</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. helping the client prepare and carry out a plan for their transition into work that covers <ul style="list-style-type: none"> <li>– managing changes to personal life such as finances, transport, appearance, conduct, sleep and recreation, relationships, housing.</li> <li>– acquisition of skills or competencies</li> </ul> </li> <li>2. liaison with client and employer during and after the transition, as required by circumstances, providing necessary support through <ul style="list-style-type: none"> <li>– coaching</li> <li>– negotiating job adjustments</li> <li>– guiding managers and supervisors</li> <li>– accessing other support or training services.</li> </ul> </li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 7: Planning  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics  Unit 8: Developing clients' self-efficacy  Unit 10: Developing advisors' own Labour Market resource</p>		

Unit 6: Interpersonal communication skills	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to demonstrate awareness and basic theoretical grounding sufficient to provide a guide to daily practice in:</p> <ol style="list-style-type: none"> <li>1. the function of respect and trust in helping relationships</li> <li>2. client-centred counselling and guidance</li> <li>3. active learning</li> <li>4. use of communication tools for effective and efficient interaction such as active listening techniques, empathy, personal awareness.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. use these communication skills appropriately               <ol style="list-style-type: none"> <li>a. listening, appreciating, not talking too much</li> <li>b. asking open questions</li> <li>c. using simple, double-sided or emphatic reflection to enhance positive                   <ul style="list-style-type: none"> <li>- skills</li> <li>- attitudes &amp; beliefs</li> <li>- actions</li> <li>- knowledge</li> </ul> </li> <li>d. summarising, reviewing</li> <li>e. probing and exploring</li> <li>f. re-framing negative situations to find the positive</li> <li>g. emphasising effort as much as results</li> <li>h. explaining failure as practice &amp; effort</li> <li>i. providing concrete and immediate feedback, and selective feedback with a focus on work</li> <li>j. providing corrective feedback giving attention to:                   <ul style="list-style-type: none"> <li>- the event / action</li> <li>- not the person</li> <li>- giving information</li> <li>- not criticising</li> </ul> </li> </ol> </li> <li>2. communicate in ways that develop clients' own preparations, plans, confidence, ability and resilience through cognitive rehearsal (thinking through activities, options, responses to events)</li> <li>3. provide information in a helpful and useful way, when the client is receptive to it and able to use it</li> <li>4. deal constructively with objections and problems, and work with difficult people</li> <li>5. use face to face or telephone methods</li> <li>6. work with specialists (e.g. health, social workers)</li> <li>7. apply the preparation &amp; planning, interview, goal, explore, evaluate, planning (PIGEEP) cycle to work-focussed interviews.</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. carrying out effective work-focussed interviews with clients               <ul style="list-style-type: none"> <li>- using advanced active listening &amp; exploring to understand clients' situations and needs</li> <li>- supporting clients' preparation for and execution of work-focussed activities</li> <li>- providing information to clients in a helpful, acceptable and usable way</li> <li>- dealing with objections and problems, and work with difficult people</li> </ul> </li> <li>2. managing necessary case / client records, confidentiality and disclosure</li> <li>3. liaison and co-operations with other support workers and specialists (e.g. health, social workers)</li> <li>4. where required by working practices, developing, leading groups of clients in co-operative work teams or groups.</li> </ol> <p style="text-align: center;">The learner will also be able to:</p> <ol style="list-style-type: none"> <li>5. focus communication on employment and employment related issues while recognising the importance of personal matters and individual diversions.</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and others. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 8: Developing clients' self-efficacy</p> <p>Note that Unit 8 and Unit 6 are required for each other: theoretical and skill-practice input can usefully be provided by learning sessions designed to cover both Units.</p> <p>Unit 9: Design &amp; application of group events / learning (if working in a group setting)</p> <p>Unit 11: Ethics</p>		

Unit 7: Planning	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to demonstrate basic knowledge, sufficient to guide practice, of:</p> <ol style="list-style-type: none"> <li>1. commonly used tools and methods in inter-personal action planning</li> <li>2. value of goal setting</li> <li>3. risks of over-difficult goals</li> <li>4. reality-checking</li> <li>5. use of achievable and proximate goals</li> <li>6. use of self-efficacy measures to estimate achievability and effort</li> <li>7. SMART planning with complex, incomplete information and uncertainty</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. gather and analyse information with clients</li> <li>2. keep a focus on work and the labour market while exploring personal and social influences on clients' choices</li> <li>3. develop trust and enable clients to analyse and resolve personal issues</li> <li>4. divide issues &amp; problems into manageable pieces, address or postpone difficult issues as needed</li> <li>5. challenge unhelpful or wrong ideas and beliefs without loss of trust and confidence</li> <li>6. explore options and work out activities and short term goals</li> <li>7. grade plan tasks to accommodate client's confidence levels</li> <li>8. help clients check the feasibility or achievability of plans</li> <li>9. assist clients to choose their goals</li> <li>10. help clients work with uncertainty</li> <li>11. provide information to help clients make decisions</li> <li>12. help clients develop SMART plans which are also flexible and adapt to change</li> <li>13. help clients review progress and adjust activities</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for using work-focussed interviewing or group work, applying inter-personal communication skills to help the client create, execute and review personal plans to assist any aspect of the job-search development, including helping clients to</p> <ul style="list-style-type: none"> <li>– recognise diverse influences and aspects of their situation</li> <li>– make decisions and decide on goals that are realistic and attainable, checking against real-life demands and circumstances</li> <li>– identify actions that are achievable and helpful to their goals</li> <li>– plan what they need to do to achieve their goals</li> <li>– take action to discover information that is needed for their decision-making</li> <li>– focus their thinking and planning on an employment outcome</li> <li>– identify and resolve problems in achieving the goals</li> <li>– develop and adjust their goals and strategies for reaching them as time and experience unfold</li> <li>– adjustment for and to work and provisions of in-work support</li> </ul>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and others. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills</p> <p>Unit 8: Developing clients' self-efficacy</p> <p>Unit 9: Design &amp; application of group events / learning (if working in a group setting)</p> <p>Unit 11: Ethics</p>		



Unit 8: Developing clients' self-efficacy	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to demonstrate basic awareness of:</p> <ol style="list-style-type: none"> <li>1. evidence in support self-efficacy as a predictor of achievement and effort</li> <li>2. difference between self-efficacy and other personal characteristics including self-confidence, self-esteem, locus of control, personality traits, and others that may be raised by learners</li> <li>3. the major influencers of self-efficacy</li> <li>4. use of Likert scales in conversation</li> <li>5. use of non-scale responses to Likert scale questions / propositions</li> <li>6. use of self-efficacy judgements to differentiate alternative course of action, or to identify achievable tasks.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. evaluate clients' and learners' existing self-efficacy for relevant tasks using Likert scales or conversational responses</li> <li>2. help clients identify activities and goals that are achievable</li> <li>3. help clients divide difficult tasks into smaller, achievable tasks</li> <li>4. provide opportunities to rehearse in practice or in thoughts</li> <li>5. provide graduated learning / progressive approximation experiences and activities to acquire &amp; show mastery</li> <li>6. review self-efficacy evaluations by clients with relevant feedback</li> <li>7. provide models, demonstrations and guides to clients</li> <li>8. provide material to encourage belief in the importance of learning or activity by clients</li> <li>9. recognise or provide supportive social and environmental factors for clients.</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. applying self-efficacy-building techniques during work-focussed interviews, with clients and employers in a variety of settings <ul style="list-style-type: none"> <li>– helping clients value their abilities and talents</li> <li>– helping clients select immediate goals and action</li> <li>– helping clients develop their own abilities</li> <li>– providing feedback and feed-forward to clients</li> </ul> </li> <li>2. The learner will be able to apply measures of clients' and employers (supervisors and managers) own self-efficacy to encourage their independent and confident action <ul style="list-style-type: none"> <li>– within clients' job search practice</li> <li>– within client's practice of competition for work</li> <li>– during planning and review of action</li> <li>– to enhance resilience against setbacks and against prejudice</li> <li>– planning for and during the transition to work and keeping the job</li> <li>– to enhance personal ability and potential.</li> </ul> </li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills</p> <p>Note that Unit 8 and Unit 6 are required for each other: theoretical and skill-practice input can usefully be provided by learning sessions designed to cover both Units.</p> <p>Unit 9: Design &amp; application of group events / learning (if working in a group setting)</p> <p>Unit 11: Ethics</p>		

Unit 9: Design & application of group events / learning	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to demonstrate:</p> <ol style="list-style-type: none"> <li>1. knowledge of techniques of learning, tuition and feedback in informal group learning settings including <ul style="list-style-type: none"> <li>– purpose and use of learning needs analysis</li> <li>– error-less learning</li> <li>– group feedback</li> <li>– encouraging participation and debate</li> <li>– support for individuals of lower or higher confidence</li> <li>– practical skill development.</li> </ul> </li> <li>2. knowledge of the simple use and application of <ul style="list-style-type: none"> <li>– Learning Needs Analysis</li> <li>– design of learning and discovery events for groups of clients</li> </ul> </li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. select and engage suitable clients</li> <li>2. carry out a basic Learning Needs Analysis that accounts for prior ability and experience</li> <li>3. include skills, and, competencies in group activities</li> <li>4. give guidance on why skills and tasks are required</li> <li>5. apply errorless learning principles</li> <li>6. provide feedback during and after group events, personally and in the group</li> <li>7. include direct experience of skills being learned, observation of the skills by models or live examples of the target behaviours, rationale and argument and social support</li> <li>8. use micro-skill rehearsal to build complex skills, leading to mastery in real-life settings</li> <li>9. monitor and respond to clients confidence and performance</li> <li>10. ensure clients are active in their personal and shared learning</li> <li>11. support individuals with low self-efficacy in the group</li> <li>12. recognise and provide for individuals of high-self efficacy in the group</li> <li>13. provide individual tuition and guidance</li> <li>14. set up and support permanent or semi-permanent action learning sets</li> <li>15. respond to the group and individuals’ skill and stage of learning</li> <li>16. include experience, reflection, theory building and exploration in the group events</li> <li>17. encourage real life application of learned skills or plans</li> <li>18. provide post-group support and monitoring</li> <li>19. provide an accessible environment and group resources responding to individual and group needs</li> <li>20. include clients in evaluation and review.</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for:</p> <ol style="list-style-type: none"> <li>1. creating, planning and leading groups of clients in co-operative work-focussed activities, to create <ul style="list-style-type: none"> <li>– learning or working environments for clients or</li> <li>– groups for mutual support encouragement and motivation</li> </ul> </li> <li>2. using a simple Learning Needs Analysis</li> <li>3. designing learning and discovery events for groups of clients</li> <li>4. leading the group in structured and mutually supportive activities focussed on employment</li> <li>5. applying various skill and confidence-building methods according to the needs of the group</li> <li>6. designing and delivering to groups with unique requirements (e.g. disabled people, migrants)</li> <li>7. reviewing the use and effectiveness of group activities and taking action.</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and others. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 8: Developing clients’ self-efficacy  Unit 11: Ethics  Creation and use of E-learning tools &amp; methods are not included in this curriculum.</p>		

<b>Unit 10: Developing advisors’ own Labour Market resources</b>	<b>Knowledge</b>	<b>Skills</b>	<b>Competencies</b>
	<p>On successful completion of the unit the learner will be able to:</p> <ol style="list-style-type: none"> <li>1. demonstrate knowledge of the local or sectoral contacts, business, professional or occupational groups and related networking</li> <li>2. understand the variety of and notable changes in the local or sectoral labour market</li> <li>3. demonstrate awareness of the limitations of statistical sources in searching for accurate local or sectoral labour market information.</li> <li>4. recognise the limitations of official and employers’ documentation about jobs and real work tasks, activities</li> <li>5. understand of the limitations of job profiles and classifications, databases and career advice or guidance procedures and personality testing</li> <li>6. demonstrate awareness of basic legislation in the field of education and employment</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. visit a range of workplaces to observe and learn</li> <li>2. make personal contact with employers</li> <li>3. develop own awareness of the job opportunities, employers, workplaces</li> <li>4. participate in networks and social groupings of employers</li> <li>5. learn about employers’ requirements, staffing and related issues</li> <li>6. use diverse sources of information</li> <li>7. assist employers with recruitment through personal guidance</li> <li>8. assist employers with recruitment through group recruitment, training, pre-employment preparation and similar projects</li> <li>9. evaluate the availability of work in the local labour market, by sector, occupation and employer</li> <li>10. analyse jobs from direct observations and first-hand reports as well as documentation</li> <li>11. compare each individual client’s ability and talent to the evaluated job</li> <li>12. provide guidance to employers on recruitment and in-work support and adjustments</li> <li>13. learn about and advise <ul style="list-style-type: none"> <li>– large enterprises</li> <li>– public services</li> <li>– small enterprises</li> <li>– self-employment and informal employment</li> <li>– various types of employment contract</li> </ul> </li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for working independently and as an advisory team to:</p> <ol style="list-style-type: none"> <li>1. develop contacts, knowledge, and involvement about and with real businesses</li> <li>2. develop and maintain an appreciation of the workings and diversity of the local labour market</li> <li>3. learn about recruitment methods applied by employers in various sectors and occupations</li> <li>4. work with employers to provide recruitment opportunities for clients</li> <li>5. make a business case for employing clients, to employers</li> <li>6. evaluate jobs with clients and employers</li> <li>7. suggest practical job adjustments and aids to employment</li> <li>8. provide transitional and ongoing in-work support to clients and employers.</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and others. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics</p>		

Unit 11: Ethics	Knowledge	Skills	Competencies
	<p>On successful completion of the unit the learner will be able to demonstrate awareness of:</p> <ol style="list-style-type: none"> <li>1. the universal declaration of human rights (UDHR)</li> <li>2. the personal and democratic rights of individuals within the jurisdiction of the country including <ul style="list-style-type: none"> <li>– rights of individuals to make personal choices</li> <li>– rights of individuals to accessible information and experience to inform their choices</li> <li>– duties of individuals and employers</li> <li>– duties of advisors towards clients and towards their employer</li> <li>– circumstances when rights and duties conflict and choice and activity may be constrained</li> <li>– impact of cultural and social factors on employers, advisors and on clients</li> </ul> </li> <li>3. the different and overlapping professional groups, qualifications and practices that may be encountered during work as an employment advisor</li> <li>4. the concepts of effective, ineffective or harmful intervention in the lives of clients</li> <li>5. the nature and ownership of personal, social and organizational or legislative power within the advisory relationship.</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. show respect and understanding for different cultures and views</li> <li>2. show respect and concern for individual human rights</li> <li>3. work within own professional competence</li> <li>4. apply evidence-based practice</li> <li>5. put the client’s interest and benefit above others’, within limits of safety and respect</li> <li>6. encourage and support informed decision and choices</li> <li>7. avoid possible harmful actions</li> <li>8. deal with conflicts of interest</li> <li>9. manage confidentiality</li> <li>10. manage risks to personal safety and property</li> <li>11. observe personal propriety both in own actions and in dealing with others</li> <li>12. evaluate the ethical standards of the service being provided.</li> </ol>	<p>On successful completion of the unit the learner will be able to take responsibility for providing an employment advice service that:</p> <ol style="list-style-type: none"> <li>1. demonstrates respect and trust <ul style="list-style-type: none"> <li>– for individuals</li> <li>– for employers</li> <li>– across social, cultural, racial and other differences</li> <li>– subject to respect for fundamental individual rights</li> </ul> </li> <li>2. works within the limits of its own professional qualification and competence</li> <li>3. puts the client’s interest and benefit above others’</li> <li>4. encourages and supports informed decision and choices by the client</li> <li>5. deals ethically with conflicts of interest</li> <li>6. recognises and deal ethically with conflicts of goals between clients and organisations or services</li> <li>7. manages confidentiality</li> <li>8. manages risks to personal safety and property</li> <li>9. applies evidence-based practice</li> <li>10. evaluates and improves the service being provided</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 12: Theory</p> <p>Note that Unit 11 and Unit 12 are required for each other: input can usefully be provided by learning sessions designed to cover both Units.</p>		

<b>Unit 12: Theory of employment disadvantage and disability</b>	<b>Knowledge</b>	<b>Skills</b>	<b>Competencies</b>
	<p>On successful completion of the unit the learner will be able to demonstrate awareness of:</p> <ol style="list-style-type: none"> <li>1. the basic evidence for self-efficacy as a mechanism of effort and achievement, and the influences on individuals' self-efficacy in employment-search settings</li> <li>2. the criticisms that are relevant to psychological and career profiling systems and employment-guidance services</li> <li>3. the concepts of 'deadweight', 'substitution', 'creaming', 'parking' and relate them to the service being provided</li> <li>4. the differences between evidence, policy, practice and theory</li> <li>5. different levels of quality of evidence</li> <li>6. the social and political rationale that underlies the service being provided</li> </ol>	<p>On successful completion of the unit the learner will demonstrate ability to:</p> <ol style="list-style-type: none"> <li>1. apply a rational and defensible, ethical definition of disadvantage for use within the service provided</li> <li>2. apply reasoning based on the concept of self-efficacy to provision of services to clients</li> <li>3. recognise doubtful inferences from evidence</li> <li>4. apply basic statistical thinking to evaluate and formulate criticism of evidence</li> <li>5. apply critical thinking to statements, analyses, policies, evidence and promotions</li> <li>6. apply evidence-based practice and adapts to new good-quality evidence</li> <li>7. find and make use of the main official sources of statistics to think about and develop the service being provided, while remaining critical and independent</li> <li>8. express views and join discussion on the policies, design and provision of employment services, using evidence and ethics to support a viewpoint.</li> </ol>	<p>On successful completion of the unit the learner will be able to demonstrate autonomous ability to:</p> <ol style="list-style-type: none"> <li>1. define and discuss the concepts of disability and disadvantage in employment</li> <li>2. understand both the social nature of disability and disadvantage</li> <li>3. understand practical aspects of disability and disadvantage, and how they impact on labour market capability</li> <li>4. understand and apply the concept of evidence-based practice and, where evidence is lacking, how to make best use of information</li> <li>5. understand and show critical or sceptical appreciation of the influence and evidential status of policy, programmes, promotional materials and expert or current opinion</li> <li>6. critically evaluate relevant statistics and policies from official sources</li> <li>7. understand and contribute to debate on the provision of employment services</li> <li>8. change or adapt their own practice in response to new evidence that may affect <ul style="list-style-type: none"> <li>– own beliefs</li> <li>– programmes provided to clients</li> <li>– legislation</li> <li>– materials and methods</li> </ul> </li> <li>9. understand how harm may be done by inappropriate interventions with clients.</li> </ol>
<b>Required Learning</b>	<p>These may be learned using skill exercises that apply both to this Unit and those listed below. Relevant knowledge may be acquired and understood in advance of skill practice or during skill demonstration to learners.</p> <p>Unit 6: Interpersonal communication skills  Unit 9: Design &amp; application of group events / learning (if working in a group setting)  Unit 11: Ethics</p> <p>Note that Unit 11 and Unit 12 are required for each other: input can usefully be provided by learning sessions designed to cover both Units.</p>		

## **Appendix 3. Using STEP – Copyright, adaptations, costs and distribution**

STEP has been designed and published so that it can be used and developed by as many organisations as wish. In the main, it is free to use and adapt for specific applications anywhere.

We have included some restrictions on the free use and adaptation policy in order to

- encourage good quality use that is consistent with the Handbook and Installation and Quality Manuals
- encourage feedback to improve the Handbook and Installation and Quality Manuals
- give due credit to the authors, project partners and funders.

The permissions and restrictions on the STEP products are set out below. Feel free to contact authors and partners on case of any questions or ambiguity.

Application of derivative applications, installations and uses of STEP are permitted in accordance with the tables 3 and 4, below.

**Table 3. Permissions and restrictions relating to STEP products**

Item	Access	Use in products or services	Re-distribution of original	Creation of courses and derivative training materials and events	Distribution of courses and derivative training materials and events	Attribution within courses and derivative training materials and events	Alter-ation for use other than creation and delivery of courses	Copy-right is held by
Research review long version	Available on e-platform / Free on request	Allowed	By permission from authors	Allowed without fee	Allowed without fee	STEP, ERASMUS+ and the authors must be acknowledged	Not permitted	Authors
Research Paper mid-version (15pp)	Free online – available on project website / Via publisher	Allowed	By permission from publisher	Allowed without fee	Allowed without fee	STEP, ERASMUS+, the authors and publisher must be acknowledged	Not permitted	Authors and publisher
Research Paper short version (8pp)	Via publisher	Allowed	By permission from publisher	Allowed without fee	Allowed without fee	STEP, ERASMUS+, the authors and publisher must be acknowledged	Not permitted	Authors and publisher
Installation Manual	Free online – available on project website / Free on request	Allowed subject to conformity with the content	By permission from authors and project partners.	Allowed without fee	Allowed without fee	STEP, ERASMUS+ and the authors must be acknowledged	Permitted only with authors' consent	Authors and project partners
Quality Manual	Free online – available on project website / Free on request	Allowed subject to conformity with the content	By permission from authors and project partners.	Allowed without fee	Allowed without fee	STEP, ERASMUS+ and the authors must be acknowledged	Permitted only with authors' consent	Authors and project partners
Handbook including Installation and Quality Manuals	Free online – available on project website / Free on request	Allowed subject to conformity with the content	By permission from authors and project partners.	Allowed without fee	Allowed without fee	STEP, ERASMUS+ and the authors must be acknowledged	Permitted only with authors' consent	Authors and project partners
Sample Exercises	Available on e-platform / Free on request	Allowed subject to conformity with the content	By permission from authors.	Allowed without fee	Allowed without fee	STEP, ERASMUS+ and the authors must be acknowledged	Permitted only with authors' consent. Additions may be made and attributed to their author(s)	Authors and project partners
Moodle implementation of training by the STEP project	Available on e-platform / Free on request	Allowed subject to conformity with the content	Not permitted	Allowed without fee	Allowed without fee	STEP, ERASMUS+ and the authors must be acknowledged	Permitted for creation of new separate courses with own access and content; not permitted to the original	Authors and project partners

**Table 4. Derivative applications, installations and uses of STEP**

	Scope	Conditions
Location	Worldwide use is permitted	Project partners must be informed
Languages	Original(s) and all others permitted	Project partners must be informed of a new language version. Professional translation is recommended to ensure fidelity to the quality standards
Use in commercial fee charging services Use in non-commercial, NGO, charitable services, whether fee charging or not Use by government departments, ministries, services and agencies Use by educational establishments and services	Permitted	Project partners must be informed. Use, installation, delivery and assessment procedures set out in the handbook, quality manual and installation manual should be followed. STEP, ERASMUS+ and the authors must be acknowledged.
Type of service	Training of advisors and counsellors to work in employment, unemployment, recruitment and career choice. May also be used during the design or review of employment service provision.	No clinical or medical benefit or service may be implied or claimed.
Support from partners and authors	May be given on request.	Partners or authors may at their own choice offer services free or for a fee to be agreed between each one and the user.
Review, evaluation and feedback	Use in design creation and delivery of training courses should include course-review or evaluation processes.	Results of reviews should be provided in confidence to partners. Additional learning materials, exercises, and learning technologies may be incorporated in the original with the permission of their authors. Improvements to procedures and quality controls may be incorporated in the original by the authors of the original.
Quotation, use of extracts	Permitted	Quotations or extracts must be attributed to the author and STEP, and must be used in contexts that respect the original meaning and purpose.



# Appendix 4.

## Informed Consent for Learners and clients<sup>8</sup>

### Introduction

Informed consent is essential in our professional transactions with others. It is especially important where we are providing services of a personal or social nature to vulnerable people or where research is to be undertaken. This is because our role puts us in a position of potential power over our clients through status, knowledge or privileged access; this in turn may cause them to act or agree to interventions under duress. Informed consent is an acknowledged method of attempting to redress the balance of power so that we can work more as partners in providing employment guidance and support to individuals. This is important not just for reasons of inclusion or social justice, important though these are, but also because the success or failure of the intervention itself often rests on the self-efficacy of the individual and self-efficacy cannot thrive when someone else directs actions and decisions.

As responsible career and employment counselling practitioners we should automatically gain the informed consent of our clients. In addition to being a sound professional practice, formal agreement from our clients to participate in our services and our commitment to a standard set of principles in this regard is important because:

- it demonstrates our respect for the client, including their right to choose in their own best interest
- it makes others aware that we are sensitive to the fact that our activities, which often involve more vulnerable individuals, may be intrusive and that we deal with issues and information of a sensitive and personal nature
- it emphasises our commitment to public protection and promotion of the highest quality career and employment counselling services we can achieve
- it shows that we consider our clients to be equal partners in the career and employment counselling process and that individuals can legitimately withdraw from the process at any time.

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<sup>8</sup> This guide draws upon the Informed Consent Guide of the Vocational Rehabilitation Association (by David Booth C.Psychol; CSci; AFBPS; PVRA).

It is the responsibility of the practitioner who is carrying out the intervention to ensure that the client has given their fully informed consent. Assuming that someone else has done so is not acceptable nor is delegating the task to another.

For career and employment counselling practitioners who are also members of other professional groups (social workers, teachers, medical staff, special pedagogues or psychologists for example) it is not intended that this brief guide should supersede their own professional body's recommended requirements for informed consent but should complement them.

## Definition

Informed consent is a method for gaining the permission of a person to carry out some intervention directly affecting them where their cooperation is vital and their permission is necessary.

*“Informed consent” is a process of sharing information with clients that is essential to their ability to make rational choices among multiple options in their perceived best interest”<sup>9</sup>*

Three elements follow from this and other definitions of informed consent in order for it to be valid:

1. **Information:** The client needs to be given information about the intervention.
2. **Capability:** The client needs to be able to make a decision on the basis of the information given.
3. **Freedom:** The client should have a realistically free choice in the matter.

## Information

This is not merely *“fact giving”* but an aid for appropriate decision making by the client; the practitioner needs to describe:

- the reason for the intervention,
- the aims of the suggested intervention
- the methods to be used
- the likely duration and frequency of meetings or the programme, for example
- the consequences of agreeing to participate, or not, including both the potential benefits and any potential risks there may be
- what records will be kept or reports produced, who will see them and what will happen to the records once the intervention is complete
- any alternative interventions that may be available to the client.

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<sup>9</sup> Simon RI 1992 in Informed Consent in Psychotherapy John O. Beahrs, M.D.; Thomas G. Gutheil, M.D. Am J Psychiatry 2001;158:4-10. <http://ajp.psychiatryonline.org/doi/pdf/10.1176/appi.ajp.158.1.4>

Partial or skewed information not only impedes gaining valid consent but also opens the career and employment counselling practitioner to claims of misleading the client, which of course can lead to very serious consequences for the practitioner in terms of professional complaints and legal claims, etc.

In short, the information we give to clients ought to be sufficient for them to be able to make the best decision in their own interests. This will vary from case to case but the practitioner must be alert to the quality and depth of information they are giving and sensitive to the impact that this is having on the client. Use of jargon, however technically accurate, can intimidate and confuse and it would be very difficult to show that the client made an informed decision given that the information provided was more suited to a professional audience than a client-centred conversation. The career and employment counselling professional should scrutinise the information given, avoid potentially confusing language and actively seek the client's assurance that they understand the information they have been given.

## Capability

In order to give valid informed consent the client has to be capable of making a fully informed decision. This does not solely mean that the client has to have the cognitive ability to make a fully informed decision, although this is an important factor, but certain structural, institutional, constitutional as well as cognitive issues may get in the way of informed decision making. The career and employment counselling practitioner needs to be vigilant and should not automatically assume that clients who agree are doing so as fully informed and capable individuals.

The client needs to be able to understand the information you are giving. Barriers to understanding may arise from many sources including one or more of a combination of factors such as:

- the information itself
- the cognitive capability of the client
- the first language of the client (including alternatives to spoken language, like signing),
- cultural and religious differences
- fatigue
- sensory impairments
- environmental distractions (noise, temperature, etc)
- stress
- the effects of medication
- excessive use of alcohol or drugs
- pain
- difficulties with reading and writing.

The career and employment counselling practitioner needs to anticipate and accommodate these factors and awareness, sensitivity, good forward planning and flexibility can go a long way to helping. In short, clients need to be able to recognise, comprehend, remember, ask questions, make decisions and communicate their decision to you.

Capability can change over time, as can be seen in some temporary conditions that affect it. For example, fluctuating conditions like social and personal stress, welfare eligibility or mental health issues can and often do have an impact on capability. The career and employment counselling practitioner should check informed consent from time to time and cannot assume that just because a client gave full informed consent in the past that they would be able to continue to do so.

Additionally, the practitioner should seek to re-validate the client's consent if new information arises that may affect their willingness to consent or changes occur to the programme, provider or procedures, etc. The practitioner ought to take the same precautions and care when re-validating informed consent as when they originally gained this and avoid any temptation to take short cuts.

## Freedom

The client should have the right to choose freely whether to participate in the services offered and also to withdraw from those services at any time. In order to exercise this freedom the client should be free from any extraneous forces real or perceived that may potentially force them to cooperate.

The career and employment counselling practitioner should be aware that any agreement to cooperate with the intervention may not be valid cooperation but in fact as a result of pressure, real or perceived, applied on the client to force their cooperation. Such things may seem extreme but as practitioners we often have a certain status or seem to be in a position of power over the client. Pressure to simply cooperate without exercising full informed decision making is therefore a very real and not an extreme or unusual circumstance.

The position is doubly problematic when working on employment, with welfare regulations, with insurance companies, in statutory programmes or as part of a court case. It is very easy for the client to see us as representing the interests of the employer, Government agencies, case handler or some other 'opposing party' rather than as a neutral agent working in the interests of the client. In any of the cases mentioned above the client can unduly accept but also unduly withdraw their cooperation, either of these may be because of the client's perception of extraneous influences. Therefore they cannot be truly accurately described as exercising informed consent as the action may bring consequences that in other circumstances the client would want to avoid or deny benefits that they would ordinarily wish to have.

Others, outside the career and employment counselling practitioner's immediate relationship with the client, may also exert undue influences for example partners, managers, other practitioners, family or friends. The practitioner needs to account for the potential for this and to try to ensure that the client is making the best decision for them by not contributing any additional undue pressures on the client for compliance.

Apart from directly applying pressure for the client to agree to receive the service, the practitioner should avoid coercing the client into agreement by giving only partial information, minimising the risks or by overpromising the effectiveness or benefits of their services.

## Record Keeping

It is important that informed consent is given in writing. Where this is not possible a suitable alternative form should be used and the reason documented and witnessed. This is to show due process but also to protect the practitioner from later claims of coercion. Alternative ways of recording consent may be desirable where the client's preferred mode of communication is not written. It is the practitioner's responsibility to find the client's preferred method for recording their consent and then to arrange for copies to be given to the client and copies kept for the case file.

However a consent form is constructed, a permanent record is recommended with some evidence that the client has understood the information given, often a signature along with the date and if necessary, witnessed, i.e. if the client can only give consent orally.

Anything documented has the potential for use in formal disputes with authorities, even in court, and you should always think about the form and content of case files with this potential use in mind. In addition, the written form can act as a reminder to the client about the nature of the consent discussion, what they have agreed to, and can act as a record of contact details in case of changed circumstances or a decision by the client to withdraw from the service.

It is useful if the form is accompanied by a detailed description of the services offered, again to act as a useful reminder for the client and to allow the client to take the information away from the consent meeting and consider at their leisure or by consulting others, thus giving more time for the client to consider or re-consider their consent and whether they want to, or continue to participate in the service.

## Remember

- Career and employment counselling practitioners should ensure that every client has adequate information about the practitioner's services and that they give consent to be involved in the service.
- Clients should be able to withdraw at any time from the service being delivered.
- Consent should be sought in a form that is appropriate to the communication needs of the client so that they are able to understand the service, its consequences and be able to freely give and withdraw consent.
- Consent should be documented in a way that is appropriate to the service being delivered and the documentation of the consent retained for an appropriate period.
- Consent should not be considered a once-and-for-all activity; it should be regularly reviewed to make sure the client still consents and especially when things change.

## Appendix 5. Quality Assurance Factors for Course Delivery

### Training and learning design Quality Assurance Factors

Skill development activities for groups and for individuals should include:

- Learning Needs Analysis carried out to confirm suitability for the learners
- Accounting for prior learning and experience
- Emphasis on behavioural outcomes (skills, activities, competencies)
- Guidance on why skills and tasks are required and effective
- Application of errorless learning principles
- Feedback to individuals and group
  - Direct experience / practice of skills and competencies
  - Observation or live examples of skills
  - Verbal and written guidance and group discussion of evidence, concepts, theory and practice
  - Social support for learning
- Micro-skill rehearsal, used to build towards complex skills
- Development of competence in real-life settings
- Monitoring of learner confidence and performance
- Active participation of learners in their personal and shared learning
- Support for individuals of low self-efficacy
- Provision of individual tuition and guidance
- Teaching methods that respond to the skill and stage of learning
- Training that includes experience, reflection, theory building and exploration
- Training contents and learning techniques that reflect the real life job of learner
- Provision of workplace / real life consolidation of skills is provided
- Provision of post-learning support and monitoring is provided

Different learning methods with a rationale for their use

- Live events
- Online content
- Offline learning
- Collaboration
- Assessment
- Reference materials

Trainers who are competent and skilled in the subject and in training

Usability

- Ease, effectiveness and efficiency of learning activities
- User safety/comfort
- User satisfaction
- Memorability
- Error prevention
- Support, help systems and documentation

E-learning elements

- support skill acquisition
- are accessible
- match the curriculum and learning objectives
- provide evaluation and assessment facilities
- are easy to use and
- are cost effective

## **Communication within the course Quality Assurance Factors**

- Communication, primarily by trainers but not excluding learners, should include:
- Listening, appreciating, not talking too much
- Asking open questions
- Using simple, double-sided or emphatic reflection to enhance positive skills, attitudes & beliefs, actions and knowledge
- Summarising and reviewing with learners as individuals and group
- Probing and exploring
- Re-framing negative situations to find the positive
- Emphasis on effort as much as results and on explaining failure as practice & effort



- Concrete and immediate feedback, and selective feedback for desired behaviours
- Corrective feedback focusing on the event or action, self-evaluation, giving information and not criticizing
- Preparation for activity through examples, guidance and cognitive rehearsal
- Providing information in a usable way
- Dealing with objections and problems, and working with demanding, less- or more-confident learners
- Managing necessary records, confidentiality and disclosure

## **Planning Activities within the course Quality Assurance Factors**

Planning events and work and activities, primarily by trainers but not excluding learners, should include:

- Conducting a Learning Needs Analysis
- Keeping a focus on work and the labour market while exploring personal and social influences
- Developing trust and enabling learners to analyse and resolve issues
- Dividing issues & problems into manageable pieces, addressing or postponing issues as needed
- Challenging ideas and beliefs
- Exploration, working out activities and short term goals
- Grading tasks to accommodate confidence levels
- Helping learners check the feasibility or achievability of plans
- Helping learners to agree to or choose their goals
- Providing information to learners
- Helping learners review progress and adjust activities

## **Developing self-efficacy within the course Quality Assurance Factors**

Course delivery should be designed to enhance the self-efficacy of learners and should include:

- Evaluation learners' existing self-efficacy for relevant tasks using Likert scales or conversational responses
- Helping learners identify activities and goals that are achievable
- Division of difficult tasks into smaller, achievable tasks

- Provision of opportunities to rehearse in practice or in thoughts
- Provision of graduated learning / progressive approximation experiences and activities to acquire & show mastery
- Review of self-efficacy evaluation by learners with relevant feedback
- Provision of models, demonstrations and guides
- Provision of material to encourage belief in the importance of the learning or activity
- Provision of supportive social and environmental factors

## **Developing Learners' Labour Market Resources Quality Assurance Factors**

Courses should include:

- Visits to a range of workplaces to observe and learn
- Direct contact with employers
- Practice developing awareness of job opportunities, employers, workplaces, by sector and occupation, including self-employment and informal employment and various types of employment contract
- Practice participating in networks and social groupings of employers
- Learning about employers' requirements, staffing and related issues
- Using diverse sources of information
- Assisting employers with recruitment through personal guidance (where required by the learners' future job roles)
- Assisting employers with recruitment through group recruitment, training, pre-employment preparation and similar projects (where required by the learners' future job roles)
- Comparison of individual clients ability and talent to proposed work
- Guidance to employers on recruitment and in-work support and adjustments

## **Ethics Quality Assurance Factors**

Courses should be provided under ethical guidelines that include:

- Respect and understanding for different cultures and views
- Respect and concern for individual human rights
- Working within own professional competence
- Application of evidence-based practice
- Putting learners' and client's interest and benefit above others', within limits of safety and respect
- Encouragement and support for informed decision and choices

- Dealing with conflicts of interest
- Managing confidentiality
- Managing risks to personal safety and property
- Observing personal propriety
- Evaluating the ethical standards of the service being provided

## **Theory Quality Assurance Factors**

Courses should be provided to a high level of intellectual integrity. This does not mean that the theoretical content needs to be excessively complex or advanced, but that courses should:

- Provide learners with sufficient theoretical knowledge and understanding to support the concepts underpinning their skills, and their critical appreciation to their working environment and their future self-development.
- Apply rational and defensible, ethical definitions of disadvantage, client needs, client rights, advisor duties and other key concepts.
- Be open and clear about the different levels of quality of evidence used in presenting learning materials
- Apply critical thinking to the rationale, design, practical delivery, and content that apply both to the course and to the acquisition of theory by learners, and be open to discussion
- Apply evidence-based practice and adapt to new good-quality evidence
- Remain critical and independent of official policy, statistics, employment services and programmes.

## STEP Partner Contacts

The organisations contributing to the development of STEP are listed below. Please feel able to contact them for more information and support.

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