

# Improving lifelong guidance policies and systems

Using common European reference tools



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A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (<http://europa.eu.int>).

Cataloguing data can be found at the end of this publication.

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We provide information on and analyses of vocational education and training systems, policies, research and practice.

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# Preface

This publication is an introduction to three common European reference tools for guidance:

- aims and principles of lifelong guidance provision;
- reference points for quality assurance systems for guidance provision in Europe;
- key features of lifelong guidance systems.

It explains the background to their development and provides suggestions on how to use each tool to improve existing policies and systems for guidance at national, regional and local levels, and for peer learning at national and European levels.





# Foreword

EU Heads of State or Government meeting in Lisbon in 2000 set a goal for Europe to become the most competitive and dynamic knowledge-based economy in the world by 2010, capable of sustainable economic growth with more and better jobs and greater social cohesion. They acknowledged that education, training and employment have significant contributions to make to achieve this goal, particularly through providing lifelong learning opportunities for all citizens, and that policies, systems and practices needed to be modernised.

Subsequently, the Education Council and the Commission agreed a common framework at European level to assist with the modernisation process. Known as the education and training 2010 work programme <sup>(1)</sup>, it consists of three interrelated strands: developing lifelong learning systems, implementing the future objectives for education and training systems, and enhancing cooperation in vocational education and training (VET). Providing lifelong guidance services for European citizens was recognised as an integral element of all three strands.

To support policy development in guidance, in December 2002, the European Commission created an expert group on lifelong guidance <sup>(2)</sup>. The main tasks of the group were to:

- develop a common understanding of basic concepts and underlying principles for guidance;
- reflect on the quality of guidance provision to develop common guidelines and quality criteria for accrediting guidance services and products <sup>(3)</sup>.

The 2004 Joint Council and Commission interim report: *Education and Training 2010: the success of the Lisbon strategy hinges on urgent reforms* <sup>(4)</sup>

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<sup>(1)</sup> See: [http://europa.eu.int/comm/education/policies/2010/doc/10\\_year\\_en.pdf](http://europa.eu.int/comm/education/policies/2010/doc/10_year_en.pdf)

<sup>(2)</sup> The group consists of 25 members selected from education and labour ministries, European social partners, European consumer, parents, and youth associations, and from European Agencies (Cedefop, European Training Foundation) and international bodies (International Association of Educational and Vocational Guidance, Organisation for Economic Cooperation and Development, World Association of Public Employment Services).

<sup>(3)</sup> These tasks reflect needs identified through a review of policies for career guidance initiated by OECD in 2001 and extended by the European Commission to all European countries in 2002-03, courtesy of Cedefop and ETF. See:

[http://www.trainingvillage.gr/etv/Projects\\_Networks/Guidance/Career\\_Guidance\\_survey/](http://www.trainingvillage.gr/etv/Projects_Networks/Guidance/Career_Guidance_survey/) and  
[http://www.oecd.org/document/35/0,2340,en\\_2649\\_34511\\_1940323\\_1\\_1\\_1\\_37455,00.html](http://www.oecd.org/document/35/0,2340,en_2649_34511_1940323_1_1_1_37455,00.html)

<sup>(4)</sup> See: [http://europa.eu.int/comm/education/policies/2010/doc/jir\\_council\\_final.pdf](http://europa.eu.int/comm/education/policies/2010/doc/jir_council_final.pdf)

called for developing common European principles and references to support national policy development. Education and training policy in the European Union is primarily a national competence. European level action in these fields therefore takes place on a voluntary cooperative basis. To improve together and to modernise education policies, systems and practices, countries agree common priorities and targets, develop common European indicators, benchmarks and reference points, and use peer learning from best practice.

Consequently, the expert group on lifelong guidance developed the following European reference tools:

- common aims and principles for lifelong guidance provision;
- common reference points for quality assurance systems for guidance, especially from a citizen/user perspective;
- key features of a systems model of lifelong guidance.

These tools are intended to help Member States improve and modernise their policies and systems through self-assessment and self-development of guidance provision at national, regional and local levels.

The need to reform policies, systems and practices for guidance in Europe was reinforced through a resolution of the Education Council in May 2004 <sup>(5)</sup> which identified as priorities: developing high quality, broadly accessible guidance provision; improving quality assurance mechanisms for guidance provision and strengthening structures for policy and systems development at national and regional levels. The resolution invited Member States to examine national guidance provision in the education, training and employment sectors in the light of the findings of the Commission, OECD and World Bank guidance policy reviews. The reference tools in this booklet can help Member States in this process.

Support for using such common reference tools was signalled recently (December 2004) in the Maastricht communiqué <sup>(6)</sup> by ministers from 32 European countries, the European social partners and the Commission. The communiqué set out new priorities and strategies for VET until the end of 2006. Guidance is included as a priority at national level and Member States are invited to: ‘use common instruments, references and principles <sup>(7)</sup> to support [...] guidance throughout life’ and ‘raise stakeholders awareness of these instruments at national, regional and local levels’.

Through this booklet Cedefop aims to introduce the European reference tools for guidance to persons with responsibility for guidance policies,

<sup>(5)</sup> See: [http://europa.eu.int/comm/education/policies/2010/doc/resolution2004\\_en.pdf](http://europa.eu.int/comm/education/policies/2010/doc/resolution2004_en.pdf)

<sup>(6)</sup> See: [http://europa.eu.int/comm/education/news/ip/docs/maastricht\\_com\\_en.pdf](http://europa.eu.int/comm/education/news/ip/docs/maastricht_com_en.pdf)

<sup>(7)</sup> Such as those developed by the European Commission expert group on lifelong guidance.

systems and practices at national, regional and local levels as benchmarks in reviewing and developing existing provision. The reference tools have been established at a general level to have broad relevance across the 25 Member States. They need to be contextualised, tested and refined. All stakeholders involved in guidance - ministries, social partners, employment services, service providers, guidance practitioners, education and training institutions, users and parents – have a valuable contribution to make and should be actively involved in reviewing and developing policies, systems and practices <sup>(8)</sup>, and in contextualising, testing and refining common reference tools.

Meetings, study visits and peer learning of guidance stakeholders present unique learning opportunities to use such tools to examine existing provision. Learning activities can be organised according to one of the three themes: principles of provision, quality assurance reference points, key features of lifelong guidance systems. Each tool represents a checklist to identify:

- areas of relative strength that could be shared with others through disseminating good examples of policy or practice and to create synergies;
- aspects which are either lacking or weak and require strengthening or improvement;
- themes or aspects where cooperation at European level could be useful.

It is important to consider the perspectives of all the different stakeholders. Please refer to Annex 1 of this booklet for suggestions on how to use the common reference tools during study visits and peer learning activities.

Cedefop plays an active role in the expert group on lifelong guidance, undertaking research and analysis, commissioning studies and disseminating the results of the group's work via publications and electronic resources such as the Cedefop guidance web pages and virtual community.

Exchanges of views and experiences on the use of the reference tools during study visits and peer learning activities are welcome and can be made via the discussion section of Cedefop's lifelong guidance virtual community: [http://communities.trainingvillage.gr/lifelong\\_guidance](http://communities.trainingvillage.gr/lifelong_guidance)

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<sup>(8)</sup> Recommended in the Council resolution on guidance throughout life (2004). See: [http://europa.eu.int/comm/education/policies/2010/doc/resolution2004\\_en.pdf](http://europa.eu.int/comm/education/policies/2010/doc/resolution2004_en.pdf)



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## SECTION 1

# Introduction

This booklet comprises three sets of common European instruments for reviewing lifelong guidance provision at national, regional and local levels and provides suggestions for their use during study visits and peer learning activities. They can be a valuable means of comparative analysis by responsible officials and service managers during Cedefop study visits and by guidance practitioners during exchanges and placements supported by the Leonardo da Vinci programme. They were developed by the European Commission's expert group on lifelong guidance to support the education and training 2010 work programme and are intended for use for the self-development and peer learning of guidance systems and services.

These common reference tools are included in: *Career guidance handbook for policy-makers* <sup>(9)</sup>, a joint publication of the EC and the OECD printed in English, French, German and Spanish. The handbook makes suggestions for improving guidance for young people and adults as well as for broadening access to services and for strengthening systems development. It contains a range of policy options and good examples of policies to meet national, regional and local needs across education, training and employment sectors.

Other results of the work of the Commission's lifelong guidance expert group can be obtained from Cedefop's guidance web pages:  
[http://www.trainingvillage.gr/etv/Projects\\_Networks/Guidance/](http://www.trainingvillage.gr/etv/Projects_Networks/Guidance/)

The web pages also contain information on related EU policy developments and programmes; the results of country career guidance policy reviews carried out by the OECD, Cedefop and the ETF; and papers from past international guidance events and information about forthcoming events. The website contains a link to Cedefop's knowledge management system eKnowVet database that enables users to search for and extract data from national career guidance policy reviews by theme across all, or a selected group, of the 29 European countries that took part in the reviews. There are also links to websites with additional information on the reviews. A section with examples of interesting policy and practice is under development.

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<sup>(9)</sup> Hard copies of the handbook can be ordered from either:

[http://publications.eu.int/others/sales\\_agents\\_en.html](http://publications.eu.int/others/sales_agents_en.html) or  
[http://oecdpublications.gfi-nb.com/isroot/OECDBookShop/Static\\_html/ab\\_8.htm](http://oecdpublications.gfi-nb.com/isroot/OECDBookShop/Static_html/ab_8.htm)

Overview/executive summaries of the text in can be downloaded in several languages from  
[http://www.oecd.org/document/35/0,2340,en\\_2649\\_34511\\_1940323\\_1\\_1\\_1\\_37455,00.html](http://www.oecd.org/document/35/0,2340,en_2649_34511_1940323_1_1_1_37455,00.html)



## SECTION 2

# Common aims and principles of lifelong guidance provision

### 2.1. Purpose

This text presents a set of common aims and principles for lifelong guidance provision developed under the auspices of the European Union's education and training 2010 work programme. The principles describe the conditions of guidance service that citizens should expect when using such services. They have been produced by Working Group G of the Objectives follow-up programme in cooperation with the European Commission's expert group on lifelong guidance. Developing common aims and principles for lifelong guidance provision at European level to support national policy and systems development was recommended in the joint report *Education and training 2010* of the Council (Education/Youth) and the European Commission (2004) to the European Council and noted in the Council resolution (Education/Youth) of May 2004 on strengthening policies, systems and practices for lifelong guidance in Europe. The resolution prioritised the centrality of the individual/learner in the provision of such services, and the need to (a) refocus provision to develop the skills of individuals to manage their career and learning, (b) widen access to services and (c) improve the quality of the services. The principles for guidance provision that follow are grouped according to those priorities. They are intended for use as a self-development tool for guidance service provision at national, regional and local levels.

## 2.2. What does lifelong guidance mean?

Guidance refers to a range of activities <sup>(10)</sup> that enables citizens of any age and at any point in their lives (lifelong) to identify their capacities, competences and interests, to make meaningful educational, training and occupational decisions and to manage their individual life paths in learning, work and other settings in which these capacities and competences are learned and/or used (lifewide). Guidance is provided in a range of settings: education, training, employment, community, and private.

## 2.3. Aims

Guidance aims to:

- enable **citizens** to manage and plan their learning and work pathways in accordance with their life goals, relating their competences and interests to education, training and labour market opportunities and to self-employment, thus contributing to their personal fulfilment;
- assist **educational and training institutions** to have well motivated pupils, students and trainees who take responsibility for their own learning and set their own goals for achievement;
- assist **enterprises and organisations** to have well motivated, employable and adaptable staff, capable of accessing and benefiting from learning opportunities both within and outside the workplace;
- provide **policy-makers** with an important means to achieve a wide range of public policy goals <sup>(11)</sup>;
- support local, regional, national and European **economies** through workforce development and adaptation to changing economic demands and social circumstances;
- assist in the development of **societies** in which citizens actively contribute to their social, democratic and sustainable development.

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<sup>(10)</sup> Examples of such activities include information and advice giving, counselling, competence assessment, mentoring, advocacy, teaching decision-making and career management skills. In order to avoid ambiguity, since a variety of terms are used in Member States to describe services engaged in these activities, including educational, vocational or career guidance, guidance and counselling, occupational guidance/counselling services, etc., the term 'guidance' is used throughout this text to identify any or all of these forms of provision and Member States should interpret the term as referring to the appropriate provision in their own countries. The definition of guidance is that adopted in the Council Resolution on Strengthening Policies, Systems and Practices for Guidance throughout Life (May, 2004).

<sup>(11)</sup> See Section 4 below.

## 2.4. Principles of guidance provision

The following principles underlie the provision of guidance:

### 2.4.1. Centrality of the citizen

- **independence:** the guidance provided respects the freedom of the career choice and personal development of the citizen/user;
- **impartiality:** the guidance provided is in accordance with the citizen's interests only, is not influenced by provider, institutional and funding interests, and does not discriminate on the basis of gender, age, ethnicity, social class, qualifications, ability, etc.;
- **confidentiality:** citizens have a right to the privacy of personal information they provide in the guidance process;
- **equal opportunities:** the guidance provided promotes equal opportunities in learning and work for all citizens;
- **holistic approach:** the personal, social, cultural and economic context of a citizen's decision-making is valued in the guidance process.

### 2.4.2. Enabling citizens

- **empowerment:** the guidance provided assists citizens to become competent at planning and managing their learning and career paths and the transitions therein;
- **active involvement:** guidance is a collaborative activity between the citizen and the provider and other significant actors, e.g. learning providers, enterprises, family members, community interests, and builds on the active involvement of the citizen.

#### 2.4.3. Improving access for citizens

- **transparency:** the nature of the guidance service(s) provided is immediately apparent to the citizen;
- **friendliness and empathy:** guidance staff provide a welcoming atmosphere for citizens;
- **continuity:** the guidance provided supports citizens through the range of learning, work, societal and personal transitions they undertake and/or encounter;
- **availability:** all citizens have a right to access guidance services <sup>(12)</sup> at any point in their lives;
- **accessibility:** guidance provided is accessible, flexible and user-friendly. It can be face to face, by telephone, e-mail, outreach, and is available at times and in places that suit citizens' needs;
- **responsiveness:** guidance is provided through a wide range of methods to meet the diverse needs of citizens.

#### 2.4.4. Assuring the quality of provision for citizens

- **appropriateness of guidance methods:** the guidance methods used have an appropriate theoretical and/or scientific/empirical basis, relevant to the purpose for which they are used;
- **continuous improvement:** guidance services have a culture of continuous improvement involving regular citizen feedback and provide opportunities for staff for continuous training;
- **right of redress:** citizens have an entitlement to complain through a formal procedure if they deem the guidance they have received to be unsatisfactory;
- **competent staff:** staff providing guidance have nationally accredited competences to identify and address the citizen's needs, and where appropriate, to refer the citizen to more suitable provision/service.

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<sup>(12)</sup> European Social Charter (1996 revision) Article 9 – The right to vocational guidance

'With a view to ensuring the effective exercise of the right to vocational guidance, the Parties undertake to provide or promote, as necessary, a service which will assist all persons, including the handicapped, to solve problems related to occupational choice and progress, with due regard to the individual's characteristics and their relation to occupational opportunity: this assistance should be available free of charge, both to young persons, including schoolchildren, and to adults.'

## 2.5. EU policy goals to which lifelong guidance contributes

Lifelong guidance assists policy-makers in Europe to achieve several common policy goals:

- **efficient investment in education and training:** increasing the rates of participation and of completion in education and training through improved matching of individuals' interests and abilities with learning opportunities;
- **labour market efficiency:** improving work performance and motivation, rates of job retention, reducing time spent in job search and time spent unemployed through improved matching of individual's competences and interests with work and career development opportunities, through raising awareness of current and future employment and learning opportunities, and through geographical and occupational mobility;
- **lifelong learning:** facilitating personal development and employability of all citizens through continuous engagement with education and training, assisting them to find their way through increasingly diversified but linked learning pathways, to identify their transferable skills, and to validate their non-formal and informal learning;
- **social inclusion:** assisting the educational, social and economic integration and reintegration of all citizens and groups including third country nationals, especially those who have difficulties in accessing and understanding information about learning and work, leading to social inclusion, active citizenship and to a reduction in long-term unemployment and poverty cycles;
- **social equity:** to assist citizens to overcome gender, ethnic, age, disability, social class and institutional barriers to learning and work;
- **economic development:** supporting higher work participation rates and enhancing the development of the workforce for the knowledge-based economy and society.

## 2.6. Indicative check list of questions to support peer learning on common European principles of guidance provision

### Function of checklist

This checklist contains examples of questions that could be used to guide your reflections on how the common European aims and principles for guidance provision relate to the guidance services in your country. The checklist is intended to assist you in identifying and summarising: (i) the strengths of, and challenges facing, your country's guidance services in relation to the common aims and principles, (ii) your ideas for future European cooperation in sharing such strengths and challenges, and (iii) your suggestions, if any, for the development of other common European reference instruments for guidance.

### Questions on principles concerning the centrality of the citizen/user (independence, impartiality, confidentiality, equal opportunities, holistic)

- (a) Are all of these principles operational in guidance services provided in your country?
- (b) Do the guidance services make them explicit to the users? How do the users know that such principles operate?
- (c) How are these principles made operational? (e.g. guidance practitioners are trained to incorporate such principles in their practice, etc.).
- (d) How is the operationalisation of these principles monitored, if at all?
- (e) Is there any significant user-centred principle missing from this list that should be added?
- (f) Should any of these principles be dropped from the list, and why?

### Questions on principles concerning the enablement of citizens (empowerment, active involvement)

- (a) Is the empowerment of users a stated objective of the guidance services or is it implicit?
- (b) Do users tend to be treated as active collaborators in formulating their career goals and plans, or more as passive recipients of guidance services' wisdom/advice/assistance?
- (c) To what extent do guidance services work through and with significant actors in the lives of users and actively involve users in this process? (e.g. setting up meetings between the user and persons with pertinent advice and information that meet the users' needs).

- (d) How is the operationalisation of these two principles monitored, if at all?
- (e) Is there any significant user-enabled principle missing from this list that should be added?
- (f) Should either of these principles be dropped from the list, and why?

**Questions on principles concerning the improvement of access for citizens to guidance services (transparency, empathy, continuity, availability, accessibility, responsiveness)**

- (a) Are all of these principles operational in guidance services provided in your country?
- (b) Do the guidance services make them explicit to the users? How do the users know that such principles operate?
- (c) How are these principles made operational? (e.g. service managers regularly review existing services/practice and adapt the service/practice as appropriate)
- (d) How is the operationalisation of these principles externally monitored, if at all?
- (e) Is any significant user-access principle missing from this list that should be added?
- (f) Should any of these principles be dropped from the list, and why?

**Questions on principles concerning the quality assurance of guidance services (appropriateness of methods, continuous improvement, right of redress, competence of staff)**

- (a) Are all of these principles operational in guidance services provided in your country?
- (b) Do the guidance services make them explicit to the users? How do the users know that such principles operate?
- (c) How are these principles made operational? (e.g. regular user surveys are undertaken and their findings acted upon).
- (d) How is the operationalisation of these principles externally monitored, if at all?
- (e) Is any significant quality-assurance principle missing from this list that should be added?
- (f) Should any of these principles be dropped from the list, and why?

**General questions**

- (a) To what extent is the definition of lifelong guidance presented in the aims and principles reflected in guidance provision in your country?
- (b) To what extent are the aims and public policy goals for guidance described in the common tool reflected in those for your country?
- (c) Summarise the strengths of guidance services in your country in respect of the common European principles for guidance provision.
- (d) Summarise the areas for the development of the guidance services in your country in the light of your responses to the questions on the common principles.
- (e) Which of these areas for development, if any, would benefit from European cooperation?
- (f) Which additional common European reference tools, if any, do you think should be developed to support guidance policy, systems and practice development at national, regional and local levels and why?



## SECTION 3

# Some common reference points for quality assurance systems for guidance provision in Europe

The five sets of reference points described below are based mainly on the findings of a study of quality assurance systems for lifelong guidance provision in Europe that was undertaken by Cedefop in 2003-04 at the initiative of the Commission's expert group on lifelong guidance. The draft reference points are intended as a first step towards building a common framework for quality in guidance services and products in Europe. Such a framework would serve as a transversal appraisal tool for quality assurance systems for guidance. In their present form they can be used for self-assessment and self-development of quality assurance systems for guidance services and products within and across sectors at national, regional and local levels.

### 3.1. Citizen and user involvement

Quality assurance systems for career guidance should:

- include information for the user regarding their entitlement (for example through users' charters) and take account of the work of national and European consumer associations in processes for consumer protection and redress;
- ensure that individual users are regularly consulted on their satisfaction with, and experience of, the service;
- require service providers to make systematic use of the findings from such consultations;
- involve the user in the design, management and evaluation of guidance services and products.

### 3.2. Practitioner competence

Quality assurance systems for career guidance should:

- require practitioners to have the competence needed to perform the guidance tasks they are called on to undertake;
- require guidance practitioners to hold, or be working towards, qualifications that ensure that they have the required competences to undertake the necessary guidance tasks;
- include the monitoring or assessment of the work of guidance practitioners with respect to the outcomes of guidance interventions that they are expected to deliver;
- require on-going professional development and service improvement;
- include all relevant practitioner associations in the development of standards and quality assurance procedures.

### 3.3. Service improvement

Quality assurance systems for career guidance should:

- include clearly defined standards of service <sup>(13)</sup>, some way of monitoring whether a service meets those standards, and, where this is not the case, a procedure to follow to bring them up to standard;
- include some way of monitoring and evaluating whether action undertaken to improve services and information, in fact, results in reaching specified standards and in ongoing improvement;
- include some way of differentiating and monitoring service provision in relation to the needs of different target groups;
- require services to form working links with, and provide support for, groups and bodies that offer guidance informally (such as parents, voluntary organisations or bodies associated with leisure activities);
- ensure that guidance materials used (for example assessment tools) meet quality assurance technical specifications.

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<sup>(13)</sup> Standards of service should apply both to direct services to users, and to information (whether printed, through ICT or in some other format) provided to users.

### 3.4. Coherence

Quality assurance systems for career guidance should:

- include links to promote effective working relationships within and across government departments on quality assurance in guidance;
- ensure there are no conflicts between different quality assurance systems operating in different guidance sectors, or in relation to different target groups;
- include ways of monitoring the use and usefulness of links between guidance-providing agencies.

### 3.5. Coverage of sectors

Quality assurance systems for career guidance should contain guidelines on guidance activities undertaken by private agencies, employers, trade unions and other non-State providers.

### 3.6. Indicative check list of questions to support peer learning on common reference points for quality assurance (QA) systems for guidance provision in Europe

#### **Function of checklist**

This checklist contains examples of questions that could be used to guide your reflections on how the common quality assurance reference points for guidance provision in Europe relate to the guidance services in your country. The checklist is intended to assist you in identifying and summarising: (i) the strengths of, and challenges facing, your country's guidance services in relation to the quality assurance references, (ii) your ideas for future European cooperation in sharing such strengths and challenges, and (iii) your suggestions, if any, for the development of other common European reference instruments for guidance.

**Questions on reference points for quality assurance systems concerning citizen/user involvement (user entitlements, consultation on satisfaction, actioning consultation findings, involvement in design, management and evaluation of services)**

- (a) Are all of these reference points operational in guidance services provided in your country?
- (b) How are these references made operational? (e.g. user entitlement statements; regular customer satisfaction surveys and action on the results, etc.).
- (c) How is the operationalisation of these reference points monitored and reported on, if at all?
- (d) Is any significant user-centred involvement in QA for guidance missing from this list that should be added?
- (e) Should any of these reference points for QA systems be dropped from the list, and why?

**Questions on reference points for quality-assurance systems concerning practitioner competence (job requirements, qualification requirements, monitoring of work of practitioners, professional development requirements of employers, involvement of professional associations)**

- (a) Are all of these reference points operational in guidance services provided in your country?
- (b) How are these references made operational? (e.g. job and qualification requirements; internal and external evaluation of work of practitioners, etc.).
- (c) How is the operationalisation of these reference points monitored and reported on, if at all?
- (d) Is any significant QA competence reference missing from this list that should be added?
- (e) Should any of these reference points for QA systems be dropped from the list, and why?

**Questions on reference points for quality-assurance systems concerning service improvement (adherence to standards, evaluation of attempts to reach standards, monitoring targeted provision, working with and through other actors/groups close to target groups, QA technical specifications for guidance materials)**

- (a) Are all of these reference points operational in guidance services provided in your country?
- (b) How are these references made operational? (e.g. defined standards of service national QA standards for guidance materials, etc.).
- (c) How is the operationalisation of these reference points monitored and reported on, if at all?
- (d) Is any significant service improvement dimension of QA for guidance missing from this list that should be added?
- (e) Should any of these reference points for QA systems be dropped from the list, and why?

**Questions on reference points for quality-assurance systems concerning cross-sectoral partnership (collaboration of different government ministries, coherence of QA systems of different sectors and for different target groups, monitoring of links between service providers in different sectors)**

- (a) Are all of these reference points operational in guidance services provided in your country?
- (b) How are these references made operational? (e.g. formal agreements on QA between ministries, regular consultation between sector personnel – managers, practitioners, etc.).
- (c) How is the operationalisation of these reference points monitored and reported on, if at all?
- (d) Is any significant cross-sectoral partnership dimension of QA for guidance missing from this list that should be added?
- (e) Should any of these reference points for QA systems be dropped from the list, and why?

**Questions on reference points for quality-assurance systems for non-state-sector guidance provision (private agencies, employers, trade unions, voluntary groups, etc.)**

- (a) Do QA systems for guidance exist in the non-state sector?
- (b) If yes, how are they made operational (ministry guidelines/standards; register of service providers; official recognition/branding)?
- (c) How is the operationalisation of these QA systems monitored and reported on, if at all?
- (d) Is any significant non-state sector dimension of QA for guidance missing that should be added?
- (e) Should this reference point of QA systems be dropped from the list, and why?

**General questions**

- (a) Summarise the strengths of guidance services in your country in respect of the common European reference points for quality assurance of guidance provision.
- (b) Summarise the areas for the development of the guidance policies, systems and services in your country in the light of your responses to the questions in the common reference points.
- (c) Which of these areas for development, if any, would benefit from European cooperation?
- (d) Which additional common European reference tools, if any, do you think should be developed to support guidance policy, systems and practice development at national, regional and local levels and why?

## SECTION 4

# Key features of a systems model of lifelong guidance for European countries

This is intended for use as a checklist for national audit of guidance systems within the context of a lifelong learning policy framework and the implementation of the Council Resolution on lifelong guidance (2004) to be used by policy-makers in partnership with other relevant stakeholders. It represents an ideal model of lifelong guidance provision against which the features of existing national systems of provision can be assessed. The checklist is intended for use in conjunction with the common aims and principles for lifelong guidance and the common reference points for quality assurance for guidance.

### 4.1. Citizen-centred features

- All citizens have **access** to lifelong guidance provision throughout their lives at times, locations, and in forms that respond to their needs.
- Citizens are provided with opportunities to **learn how to** make meaningful educational and occupational decisions and how to manage their learning and work so that they can progress through diverse learning opportunities and career <sup>(14)</sup> pathways.
- **Mechanisms** exist to allow citizens to: to invest efficiently in and benefit from lifelong learning opportunities; to identify competences gained from non-formal and informal learning; and to develop other competences.
- Citizens' participation in guidance is enhanced through the application of **principles** for lifelong guidance provision such as those set out in Section 2.
- Citizens' **entitlements** to guidance are clearly defined.
- **Citizens are referred** for additional guidance assistance, as appropriate, within and across sectors, and across national boundaries.

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<sup>(14)</sup> Career refers to pathways in life in which competences are learned and/or used. The term covers lifewide experiences both formal (education, work) and informal (home, community).

- **Continuous improvement** of guidance services, of career information, and of guidance tools and products is promoted through the application of quality assurance mechanisms, such as those set out in Section 3, in which the citizen/user plays a key role.

#### 4.2. Policy development features

- Lifelong learning and the development of employability are the **guiding principles** and frameworks for the development of policies, systems and practices for lifelong guidance.
- Policies and programmes for lifelong guidance are an integral part of national and European Community level social and economic development policies and programmes. These include policies and programmes relating to **education, training, and employment**, social inclusion, gender equity, human resource development, regional and rural development, and improving living and working conditions.
- Guidance policies and programmes for guidance are developed in a **coordinated** way across education, training, employment and community sectors within a lifelong learning and active employability framework.
- The roles and responsibilities of all those who develop lifelong guidance policies, systems and programmes are clearly **defined**.
- Policies and programmes for lifelong guidance are formulated and implemented through **stakeholder participation** in mechanisms such as national forums for guidance. Relevant stakeholders include ministries, users, social partners, service providers, employment services, education and training institutions, guidance practitioners, parents, and youth.
- Policies and programmes for lifelong guidance **take into account national and international economic change and technological development**. They are reviewed periodically in relation to current and planned social and economic development.

#### 4.3. System coordination features

- Guidance systems operate in an open, **flexible** and complementary way across education, training, employment and community sectors.
- Guidance services within one sector are coordinated with services in other sectors at national, regional and local levels. Close **cooperation** and coordination exist between guidance provided outside of the



education and training system and guidance provided within it.

- Formal networks and **partnerships** of guidance providers are established at the local level.
- Guidance in the **workplace** is delivered by partnerships between education and training providers, public employment services, enterprises, and organisations that represent workers.
- Representatives of the social partners and other **stakeholders** are included in the bodies responsible for governing publicly funded guidance services.
- In decentralised structures, central arrangements exist to ensure **consistency in regional and local services** so that all citizens benefit equally, regardless of geographical location.

#### 4.4. Targeting within universal provision

- Measures are taken to provide effective and adequate guidance for learning and work for **groups who are at risk of social exclusion** such as: persons who did not complete compulsory schooling or who left school without qualifications; women; older workers; members of linguistic and other minority groups; persons with disabilities; migrant workers; and workers in fragile economic sectors and enterprises who are at risk of unemployment. The goal of these measures is to help these groups to enjoy equality in employment and improved integration into society and the economy.
- Such measures are part of national, regional and local **strategies** for universal lifelong guidance provision.

#### 4.5. Review features

- (a) **Guidance systems and programmes are periodically reviewed** to:
- make the best use of available resources;
  - promote synergy within and across education, training and employment sectors;
  - adjust their organisation, content and methods in light of: changing social and economic conditions; the changing needs of particular groups; and advances in relevant knowledge;
  - make any changes that are required for the effectiveness of national policies.

- (b) Research is undertaken to **support evidence-based policy and systems development.**
- (c) **Research** and experimental guidance programmes are designed to:
  - evaluate the internal efficiency and external effectiveness of individual components of the lifelong guidance system;
  - determine the direct and indirect costs and benefits of alternative patterns and methods of providing lifelong guidance;
  - determine criteria for setting priorities and establishing strategies for the development of lifelong guidance for particular sectors of economic activity and for particular groups of the population;
  - increase knowledge of the psychological, sociological and pedagogical aspects of lifelong guidance;
  - improve the psychological tests and other methods used for the identification of competences, the appraisal of aptitudes and interests, and the assessment of levels of knowledge and skill attained through non-formal and informal learning;
  - assess employment opportunities in the various sectors of economic activity and occupations;
  - Improve available information on occupations, their requirements and career progression pathways.
- (d) Administrative arrangements and methods are designed and modified so that they **support the implementation of lifelong guidance programmes.**

#### 4.6. International features

- (a) **Europe is the reference field** for the provision of lifelong guidance services within the European Union.
- (b) Member States cooperate with each other, with the European Commission and with other stakeholders in planning, elaborating and implementing **collaborative action** in lifelong guidance within the context of Community policies and programmes for education, training and employment.
- (c) Such cooperation may include:
  - bilateral or multilateral assistance to other countries in the planning, elaboration or implementation of such programmes;
  - joint research and peer learning to improve the quality of the planning and implementation of programmes;
  - helping those who work in guidance to acquire knowledge, skill and experience not available in their own countries: for example by giving

them access to facilities in other countries or by establishing joint facilities;

- the systematic exchange of information, including the results of research and experimental programmes, by means of expert meetings, transnational exchanges and placements, seminars, study groups, thematic networks or exchange of publications;
  - the preparation and dissemination of basic guidance material, including curricula and job specifications, to facilitate occupational and geographical mobility.
- (d) Member States encourage and support **centres that facilitate exchange of experience** and promote international cooperation in policy, systems and programme development and methodological research.

#### 4.7. Indicative check list of questions to support peer learning on common systems features for lifelong guidance in Europe

##### Function of checklist

This checklist contains examples of questions that could be used to guide your reflections on how the common systems features for guidance provision relate to the guidance services in your country. The checklist is intended to assist you in identifying and summarising: (i) the strengths of, and challenges facing, your country's guidance services in relation to the common system features, (ii) your ideas for future European cooperation in sharing such strengths and challenges, and (iii) your suggestions, if any, for the development of other common European reference instruments for guidance.

##### Questions on features concerning the centrality of the citizen/user (lifelong access, career planning competence development, identification of lifewide competences, citizen-centred service principles, appropriate referral, involvement in quality assurance)

- (a) Are all of these features operational in guidance services provided in your country?
- (b) Are such features evident to the users/potential users? How are they made evident?
- (c) How are these features made operational? (e.g. ministry sets down guidelines, etc.).

- (d) How is the operationalisation of these features monitored, if at all?
- (e) Is any significant citizen-centred feature missing from this list that should be added?
- (f) Should any of these principles be dropped from the list, and why?

**Questions on policy development features (lifelong learning and employability as guiding principles, integral/explicit part of national social and economic policies, policy development coordination across sectors, clear roles and responsibilities for policy and systems development, wide stakeholder participation, regular reviews in light of national and international changes)**

- (a) Are all of these features operational in policy development for guidance in your country?
- (b) How are these features made operational? (e.g. national forum supplemented by regional forums, etc.).
- (c) How is the operationalisation of these features monitored, if at all?
- (d) Is any significant policy development feature missing from this list that should be added?
- (e) Should any of these features be dropped from the list, and why?

**Questions on system coordination features (complementarity, coordination, formal networks and partnerships, partnership approaches to workplace guidance, involvement of social partners and other actors, central arrangements/standards for decentralised structures)**

- (a) Are all of these features operational in systems coordination for guidance in your country?
- (b) How are these features made operational? (e.g. formal agreements between ministries and service providers across sectors; national forum supplemented by regional forums, etc.).
- (c) How is the operationalisation of these features monitored, if at all?
- (d) Is any significant systems development feature missing from this list that should be added?
- (e) Should any of these features be dropped from the list, and why?

**Questions on targeting within universal provision (national, regional and local strategies for universal guidance provision include measures for targeting services for those at risk of social exclusion)**

- (a) Is this a feature of policies for lifelong guidance provision in your country?
- (b) How is this feature made operational? (e.g. special ministry funding; guidelines for targeting; priority assigned centrally, etc.).
- (c) How is the operationalisation of these features monitored, if at all?
- (d) Is any significant targeting feature missing that should be added?
- (e) Should any of these features be dropped from the list, and why?

**Questions on policy and systems review features (periodic reviews, research for evidence-based policy-making, continuous research and development programme, changes made to administrative arrangements and methods as a result of research)**

- (a) Are all of these review features operational in policy and systems development for guidance in your country?
- (b) How are these features made operational? (e.g. part of national strategy; annual programme funded by ministries).
- (c) How is the operationalisation of these features monitored, if at all?
- (d) Is any significant policy and systems review feature missing from this list that should be added?
- (e) Should any of these features be dropped from the list, and why?

**Questions on international features (collaboration between Member States and with the European Commission and international institutions on policy development, bi-lateral and multi-lateral actions, joint research, knowledge exchange and transfer, peer learning, supporting occupational and geographical mobility, support for centres for international cooperation in policy and systems development)**

- (a) Are all of these features operational in policy and systems development for guidance in your country?
- (b) How are these features made operational? (e.g. involvement in EU programmes and initiatives; support for international cooperation such as International Centre for Career Development and Public Policy; participation in international policy symposia for guidance, etc.).
- (c) How is the operationalisation of these features monitored, if at all?
- (d) Is any significant international feature missing from this list that should be added?
- (e) Should any of these features be dropped from the list, and why?

### **General questions**

- (a) Summarise the strengths of guidance services in your country in respect of the common features of lifelong guidance provision.
- (b) Summarise the areas for the development of the guidance policies and systems in your country in the light of your responses to the questions on the key features.
- (c) Which of these areas for development, if any, in your response would benefit from European cooperation?
- (d) Which additional common European reference tools, if any, do you think should be developed to support guidance policy, systems and practice development at national, regional and local levels and why?

## ANNEX 1

# Additional suggestions for using the reference tools to review existing guidance provision

## I. Identifying areas of relative strength

- Using the reference tool, which aspect/s of policies/systems/services and practices are well-developed and effective in your country?
- Which particular aspect/s of these could you cite as a good example of policy or practice and why?
- How do you currently share good examples of policy/systems/practice at national level?
- How do (or could) you share good examples of policies/systems/practices at European level? (e.g. via websites, and databases and/or via membership of a European network of national guidance forums, a study visit or peer learning. See Annex 2 for a list of possible resources).

## II. Identifying gaps and weaknesses

- Using the reference tool, which aspects of policies/systems/practices are absent from provision in your country/sector region/locality and why?
- Using the reference tool, which aspects of policies/systems/practices are weak or underdeveloped in provision in your country/sector region/locality and why?
- Which gap/weakness/underdevelopment would you prioritise as needing attention from short-term and long-term perspectives?
- Do the various stakeholders (e.g. users, managers, practitioners) have different perspectives on existing provision, the underlying reasons for the gaps/weaknesses and the relative priorities for development? How do you know?
- Which role if any, could each stakeholder play in improving provision and

addressing gaps/weaknesses (e.g. forms of support, service provision, training)? How do you know?

- How could the stakeholders work better together to improve the situation? What mechanism (e.g. acknowledgement of who the stakeholders are, setting up a coordinating body or national forums of guidance stakeholders) would assist this?

### III. Identifying possible areas for European cooperation

- How can countries support each other in improving their policies/systems and practices?
- Which specific aspects of services/policies/systems/practices would be useful to pursue through cooperation at European level and why?
- Which mechanisms could be used to support such cooperation? (e.g. via a study visit, peer learning, membership of a European network of national guidance forums, participation in a European virtual community on guidance, use of European databases of examples of policy and practice? See Annex 2 for a list of possible resources).
- Prioritise these mechanisms in order of both preferred ways of peer learning and most effective/useful ways of peer learning. Are the results the same?
- Which mechanisms would have most impact in bringing about desired change at national, regional and local levels?
- What conclusions can you draw about European level support mechanisms?

### IV. Refining the tools

- Which aspects, if any, of the common European reference tool/s appear irrelevant or inappropriate? Why?
- Which important aspects, if any, are not covered by the tool/s?
- Which ideas, if any, do you have for additional uses of the tool/s at European, national, regional or local levels?

Please send comments/suggestions to [jwa@cedefop.eu.int](mailto:jwa@cedefop.eu.int) who will forward them to the Commission services.



## ANNEX 2

# A selection of existing European resources available to support peer learning and exchange of experience for lifelong guidance

## I. Study visits

### (a) For guidance practitioners

Academia is a network of guidance organisations in Europe funded through the Leonardo da Vinci (LDV) programme which organises transnational placement programmes for guidance practitioners in participating countries. To find out more about the network and how to apply to participate in an exchange/placement, go to: <http://www.ac-creteil.fr/steurop/Welcome.html>

### (b) For vocational training specialists

This is also financed by the LDV programme and is managed by Cedefop. To find out more about the programme and how to apply go to: <http://studyvisits.cedefop.eu.int/index.asp?cid=2&artid=129&scid=3&artlang=EN>

## II. Databases and discussion platforms

### (a) **Cedefop's lifelong guidance virtual community**

This enables practitioners, policy-makers, researchers and social partners involved in guidance to feed into the work of the Commission's expert group on lifelong guidance and to exchange views and experiences on a range of topical guidance issues. You can use the virtual community to initiate discussion on an issue that interests you or participate in an existing discussion, invite others to share relevant experience with you and comment on draft papers of the expert group. To apply to join go to: [http://communities.trainingvillage.gr/lifelong\\_guidance](http://communities.trainingvillage.gr/lifelong_guidance)

### (b) **European guidance research forum website**

This is being developed through an LDV project 'Supporting innovative counselling and guidance: building dialogue between research and practice'. The project aims to pilot the development of a network for guidance and counselling, supported by a website to bring research and practice closer to improve services to clients. To find out more go to: <http://www.guidance-europe.org>

### (c) **Guidenet**

The Guidenet project is financed by LDV and has established a transnational network of expertise to gather together guidance initiatives, evaluate and comment upon them and to disseminate them as widely as possible within the guidance communities in Europe. The primary target groups for Guidenet are guidance counsellors, guidance organisations, policy-makers and other actors in the guidance field at all levels nationally and transnationally. To find out more go to: <http://www.guidenet.org>

### (d) **Exemplo**

Exemplo is a virtual place (through the extranet) for exchanging good practices and communication between practitioners for offering, supplying a product or a method, giving some advice or looking for a partner, or creating and experimenting jointly. **Exemplo**, managed by the European Vocational Training Association (EVTA), is a vocational training network comprising 15 members from 14 European countries, representing national training and, in certain cases, national employment services, see: <http://www.evta.net>



Cedefop (European Centre for the Development of Vocational Training)

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