

An edited version of a report first published in 1986 ²

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The Challenge of Change: developing educational guidance for adults

Unit for the Development of Adult Continuing Education ¹

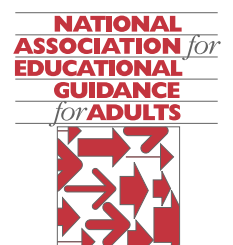
Edited by Jonathan Brown

Foreword

Why re-publish?

NAEGA is pleased to be able to re-publish an edited version of the central chapters of *The Challenge of Change* ² which was first published by UDACE ¹ in 1986. We do so because the 1986 report made such a lasting impact on the development and practice of adult guidance. It is still widely cited by colleagues writing and speaking about guidance. In particular the seven activities of guidance are in current usage in most services providing guidance for adults. Even in those services where only some of the seven activities are currently available, the terminology and concepts are used as a way of understanding and evaluating practice. In *The Challenge of Change*, guidance is clearly identified as an umbrella terms for a dynamic process in which the seven activities are all expressed in the -ING format. The report places these seven activities in context by emphasising that guidance for adults:

- has the primary purpose of improving the match between learning opportunities and the needs and interests of learners and potential learners
- encourages all adults to engage in learning whether for work-related or personal development reasons and that this entails reaching out to those adults not currently engaged or contemplating learning
- is an essential component of education and training which focuses on the individual's personal relationship with what is to be learned
- is about choice and decision-making by the client so that its central focus is the individual



- involves the client in processes of evaluation, identification, implementation and review of needs and plans
- needs to be informed by a set of principles including accessibility, confidentiality, client-centredness and independence.

Most of this analysis is still relevant in meeting the challenges of our work in the early years of the 21st century. These issues are involved in the development of national strategies for skills in each of the four parts of the United Kingdom.

There are inevitably some parts of the 1986 report which would be written differently if drafted today and some parts which make sense only in terms of the educational, training and organisational environment of the 1980s. In terms of 2003, the *counselling activity* requires either further explanation or change to **using counselling skills**. (For a fuller discussion of this point see endnote 11.) To meet these issues of dating and to assist the reader in 2003, editing has been undertaken to separate discussion of the purpose, place and nature of guidance from the context of 1986. An explanation of the editing is given in the next paragraph.

NAEGA hopes that in re-publishing this edited version of *The Challenge of Change* it is making a significant contribution to contemporary debate about the purpose and practice of adult guidance as a part of its service both to members and to policy makers throughout the UK.

Editing: what has been done?

The intention is, as far as possible, to retain the words of the 1986 report which explain the purposes and principles of guidance for adults. So the first task undertaken in editing has been to select from the central chapters of *The Challenge of Change* those sections which relate to the purpose, place and nature of guidance. An explanation of what has been selected and where it comes from in the 1986 report is given in detail in endnote 2. The second editorial task has been to give full endnotes to help the reader with the text, especially where there have been subsequent developments. Thirdly there has been some correction of errors in the original but these have been kept to a minimum. The final editorial input has been to add emphasis to certain key sections of the report.

Who should read it?

In re-publishing this seminal work NAEGA believes that it will become essential reading for

- **Practitioners** (Adult guidance practitioners claim a range of titles according to employer and location but included are adult guidance workers, careers advisers, careers officers, learning/student support advisers, training advisers, employment advisers, personal advisers.)
- **Managers**
- **Policy Makers**
- **Students**

The NAEGA input 1984-1986

In tackling Adult Guidance UDACE appointed an expert Group. At the time of the publication of *The Challenge of Change* in 1986 the Development Group on Educational Guidance for Adults had 18 members, many of whom were active within NAEGA. These included:

Jonathan Brown	(OU and NAEGA Chair)
Linda Butler	(ECCTIS)
Dorothy Eagleson	(EGSA Belfast and NAEGA President)
Geoff Ford	(Leeds Careers Service)
Ruth Michaels	(Hatfield Polytechnic and Polytechnic Association for Continuing Education)
Vivienne Rivis	(EASA, Bradford)
Sue Thurston	(Hammersmith and Fulham Education Advice Service)

In addition Judy Alloway (then NAEGA Secretary) and Letitia Opie (Manchester Education Advice Service for Adults) who job-shared the UDACE National Development Officer post were also involved in the development of the report. So the NAEGA involvement was active and significant.

Acknowledgements

NAEGA is grateful to NIACE which holds the copyright for *The Challenge of Change* for permission to publish this Occasional Paper. In particular, Virman Man, Senior Publications Manager at NIACE, has been most helpful.

I EDUCATION, TRAINING AND GUIDANCE ²

All of us, as we move through adult life, undertake a great variety of learning tasks. We learn skills for enjoyment, for employment and to cope with unemployment; we learn to manage our finances and our relationships with other people; we learn to be parents and to support dependent parents. We undertake many of these learning tasks informally, by trial and error, with advice from friends and neighbours, by reading books and magazines or from radio or television. Probably most of our learning is undertaken in this informal way, but more formal opportunities are also available. These include a wide range of education and training courses, organised face to face or on a 'distance' basis, together with a variety of forms of 'open learning or guided independent study. Such opportunities may be offered by educational institutions, employers, voluntary bodies, community groups and the media. They may be narrowly aimed at teaching particular skills or knowledge (electronic assembly, lip-reading or needlework) or, more broadly, at personal development (literature or parent education). Opportunities may be full- or part-time, local or remote, regular or occasional. They may be open to anyone, or to those with particular qualifications, or those employed in a particular organisation. Access to opportunities may be restricted or assisted by location, timing, the availability of child care or special equipment, or cost, including the availability of support from employers, awards, grants or benefits.

While this variety of opportunities and agencies may reflect a flexible and creative service of education and training, offering a broad range of choice, it can be extremely difficult, even for experienced professionals, to find the right opportunity to meet a particular need, even when the opportunity already exists. The problem is greater when a need can only be met by the reshaping of an existing course, or the creation of a new one. While many education and training agencies are willing to respond to new needs, designing learning opportunities for particular individuals or groups, most adults are unaware of this and many lack the necessary skills and knowledge to negotiate such changes successfully, whether this involves adjusting a timetable, organising child-care facilities, or fundamental curriculum change. All these problems are at their greatest for those who have had least contact with learning, at school and afterwards; who are most vulnerable to the impact of social and economic change and for whom education or training is therefore of special importance. ³

The Purpose of Educational Guidance ²⁰

There is a very widespread agreement that, if we are to meet the challenge of change in the next decades, we need a better educated and more adaptable adult population, who see themselves as successful and effective learners, and who see learning as a normal part of adult life, helping them to develop and adapt to new circumstances. If this is our aim the range and variety of opportunities described above offers us a great resource, but the difficulties which people experience in using that resource are often formidable. We have a great richness and range of opportunities available (or potentially available), and a substantial body of people willing to learn, separated by a great gulf of ignorance. It is this gulf which educational guidance seeks to bridge.

The primary purpose of educational guidance is to improve the match between learning opportunities and the needs and interests of learners and potential learners. This will include needs related to work (both paid and unpaid) and to personal development. Guidance can help clients, individually or in groups, to clarify their learning needs and find appropriate ways of meeting them. ⁴ It can also channel information about unmet, or inappropriately met, needs to the education and training providers, helping them to develop more relevant and accessible provision. Thus, by helping learners and providers, educational guidance contributes to the development of an effective, economical and relevant service of education and training, and helps to increase public confidence in the ability of the education and training services to meet real needs.

Finding appropriate learning opportunities does not necessarily imply enrolment on 'courses', since many adults learn independently, on a self help basis, without contact with formal education or training agencies. Many of these could be more effective learners with assistance from educational guidance and some of those currently enrolled on formal courses might, with appropriate guidance, be able to meet their needs more effectively by less formal and expensive means. If we wish to ensure that the maximum benefit is obtained from all the resources available for adult learning we need to develop a more effective provision of educational guidance. The development of such provision is the subject of this paper.

Kinds of Guidance – Personal, Vocational, Educational

All of us need guidance in the course of our daily lives. We seek and receive it from a variety of sources – friends, relatives and acquaintances as well as a range of professionals. We may seek guidance in circumstances as varied as divorce, the choice of a degree course or the purchase of a roll of wallpaper.

The common factor is that in every case we are making a choice, and seeking a means to make that choice as wisely as possible. Decision-making is thus at the centre of all guidance. ⁴ The business of the ‘guide’ is to help the client both to make the most appropriate decision in the immediate situation and to develop the skills to make such decisions wisely in future. The client may need information, advice, counselling or assessment, and in some cases may need more direct support with enabling or advocacy.

Three kinds of guidance are relevant therefore:

- ▶ **Personal guidance** which embraces both educational and vocational guidance, and is concerned with choices about a wide range of personal issues, including identity, roles and relationships.
- ▶ **Vocational guidance** involving choices about the way in which individuals contribute to the community through paid work or other activities. Vocational decisions are usually seen as choices about paid employment, but social change is rapidly breaking down long-established assumptions about the place of paid employment in the lives of individuals. Vocational choices may therefore also involve unpaid work (including domestic, caring and voluntary roles).
- ▶ **Educational guidance** involving educational choices, concerned with learning needs and interests and ways of meeting them. This is the principal subject of this chapter.

These three kinds of guidance interlock in complex ways. Many adults who present themselves for ‘educational’ guidance have ‘vocational’ motives, either immediately in view, or in some tentative, long-term perspective. Many also have ‘personal’ ones, hoping that education will change their lives and the kind of people they are. On the other hand, many ‘vocational’ and ‘personal’ objectives can only be approached through ‘educational’ routes (and these are often surprisingly circuitous). However, it should be noted that there are areas of educational guidance for which there is little or no ‘vocational’ element (working with retired clients is one obvious example) and there are some areas of ‘vocational’ guidance (though a declining number) which have no immediate educational implications.

Miss A is 47 and disabled following a stroke. She lives alone and has no close family. She suffers from periodic bouts of clinical depression. She is desperately anxious to be among other people and wants ‘to do something, anything, to stop me going mad’.⁵

The Place of the Individual

The central focus of any guidance process is the individual. ⁴

... A wide variety of agencies and organisations will benefit from the availability of educational guidance... [But] guidance is essentially concerned with individuals, and their individual needs, even when those needs are shared with others or can be most effectively met through group activities. Whatever the motivation, and however much persuasion is applied by other people, the final choices will always be made by individuals.

The long-term interests of society require the development of a climate where learning is regarded as something natural and appropriate for all adults, and where those adults can recognise and find ways of meeting their learning needs easily and effectively as they arise. Educational guidance must, therefore, concentrate on individual clients, helping them to make informed choices, based on a sound assessment of their own experience, skills, knowledge, motives and opportunities.⁶

This emphasis on the development of the individual does not stem from an idealised view of society or the individual, but from a practical recognition that all learning depends on motivation. While other people and agencies, including employers, government agencies and others, may wish to encourage individuals to undertake particular kinds of learning, nothing will be achieved without motivation, which depends on the learner understanding what is to be learned and its relevance to his or her needs and interests. There is a further reason for focusing attention on the individual. While other agencies may commit resources to education and training, the individual invests time, energy and often money in undertaking learning and has to live with the consequences over a much longer period than employers or governments plan for. The individual has, therefore, the greatest interest in making wise decisions and the greatest need for professional advice in doing so.

Guidance and Teaching

While educational guidance has often been seen as a ‘gateway’ to education and training, it is important to recognise that learning and guidance are intimately connected. One of the

principal objectives of any successful teacher or trainer is to help learners to understand their own learning, and to plan and approach it in the most effective way. While this is, and always has been, central to the teacher's role, it is also a guidance role. **Guidance is that essential component of education and training which focuses on the individual's personal relationship with what is to be learned.** ⁴ The guidance worker, whether 'internal' or 'external', starts with a recognition that different people have different needs, knowledge, experience, motives and opportunities, and that these differences affect the ways in which they learn and the choices which they make. Educational guidance helps them identify what they need to learn and how to do so effectively. The same skills are required, whether they are applied by an 'external' guidance worker, helping a 'client' to plan a learning programme in advance or by an 'internal' one helping a 'student' or 'trainee' to approach a part of the learning task.

Guidance and the Curriculum

While educational guidance concentrates on the individual and his or her needs, these will not be effectively met unless those providing learning opportunities are able and willing to change their provision to meet new and changing requirements. There is, therefore, a close relationship between educational guidance and curriculum development.

All agencies offering learning opportunities to adults need constantly to review the relevance of what they provide to the needs of potential and current learners. This involves a consideration of what is offered, the forms and style of its delivery, and how information about it is presented to potential learners. Both internal and external guidance workers therefore have a role to play in the design and implementation of education and training programmes, helping in the identification of needs and in the planning of ways to meet them, in the light of their special knowledge of what potential and current learners are seeking, and the ways in which they learn, or fail to learn. This involves major policy and curricular issues for education and training agencies and it is essential that they should be fully involved, at all levels, in the development of educational guidance provision.

Education and Training ⁸

Distinctions are often drawn between 'education' and 'training'. There is considerable disagreement about the nature of the distinction, but training is usually regarded as being more closely directed to specific outcomes, often in particular employment-related skills. It is also frequently suggested that, for adults at least, training is in some sense more relevant or important, or that it should have higher priority for public expenditure than 'education'... The distinction seems of decreasing value, as the 'training' needs of adults become more complex, and more dependent on adequate 'education'. The pace of change in recent years means that most adults have received less education than most current school leavers, and this gap will continue to widen unless we expand opportunities for adults to learn throughout their lives. Whether we call such learning 'education' or 'training' is, ultimately, irrelevant. Both are essential, and both should be encouraged. When an adult is seeking guidance about learning he or she may well not be clear about whether the need is for 'education' or... ['training'] ⁷, and we do our clients a disservice if we cannot offer assistance with both.

For convenience we use the term 'educational guidance' in this report to embrace guidance about all kinds of learning, and we believe that this is as relevant to work-related learning as to general education. ⁸

2 THE NATURE OF EDUCATIONAL GUIDANCE ²

The Process of Educational Guidance

While the agencies and institutions which deliver educational guidance will vary between areas and communities, the range of needs to be met are the same. **A comprehensive service of educational guidance for adults will be able to assist all adults to:**

- ▶ **Evaluate** their own personal, educational, and vocational development, possibly assisted by a guidance worker and/or formal assessment techniques;
- ▶ **Identify** their learning needs and choose the most appropriate ways of meeting them, bearing in mind constraints of personal circumstances, costs, and availability of opportunities;
- ▶ **Pursue and complete** a programme of learning as effectively as possible (this might include learning through a formal course, an open learning programme, a self-help group or self-directed private study);
- ▶ **Review and assess** the learning achieved and identify future goals. ⁴

Educational guidance is a process, rather than a single event, and the same individual will need different kinds of guidance at different times. It may be appropriate:

- ▶ *when an individual is first contemplating learning* and is seeking the most appropriate opportunity;
- ▶ *when first embarking on learning* (enrolling on a course, choosing a learning package, etc.), from staff knowledgeable about particular courses, materials or programmes;
- ▶ *during the course of study*, from tutorial staff, student counsellors or careers advisers;
- ▶ *on finishing a piece of learning* (whether or not it was successfully completed), in order to review what has been achieved and set new goals. ⁹

Educational guidance agencies also have a part to play in encouraging adults who have not previously considered it to engage in education and training.

It is important to acknowledge that individuals may be part of networks and groups, and that the clarification of some educational needs has to be done in a group context, particularly where there is a history of indifference/antagonism to formal education. Advice and Guidance services may only gain trust by demonstrating to existing groups a commitment to their concerns, or by helping to develop new groups with resources to meet their own needs. Social learning is as important a part of the clarification of needs as individual guidance. We need to develop a clearer understanding of the relationship between the two. (EGSA Worker) ¹⁰

The Activities of Educational Guidance

In this report the term 'educational guidance' is used to embrace a range of activities, which may be provided by a variety of agencies. In practice, these activities merge into one another but it is important to recognise the differences between them, since some agencies will choose, for reasons of policy or resource constraint to offer only a limited range. When such boundaries are drawn it is important that both staff and clients understand what is, and is not, being offered. While such a limitation may be appropriate in particular circumstances the choice should be made explicitly and not by default, and in full recognition that a client's needs are unlikely to be met by a single activity.

Although many agencies will only undertake some of these activities, a comprehensive service of educational guidance will include all of them.

Informing

Providing information about learning opportunities and related support facilities available, without any discussion of the relative merits of options for particular clients. Since most published educational information is produced for promotional purposes, 'pure' information is rare.

Advising

Helping clients to interpret information and choose the most appropriate option. To benefit from advice clients must already have a fairly clear idea of what their needs are.

Counselling ¹¹

Working with clients to help them to discover, clarify, assess and understand their learning needs and the various ways of meeting them. Clients requiring counselling are likely to be unclear about their needs and require time to explore their feelings about the options; counselling is therefore more likely to involve a series of contacts with a single client.

Assessing ¹²

Helping clients, by formal or informal means, to obtain an adequate understanding of their personal, educational and vocational development, in order to enable them to make sound judgements about the appropriateness of particular learning opportunities.

Enabling ¹³

Supporting the client in dealing with the agencies providing education or training, or in meeting the demands of particular courses. This may involve simple advice on completing application forms, advice on ways of negotiating changes in course content or arrangements, or assistance to independent learners. A further kind of enabling is provided through 'Access' and 'Wider Opportunities' courses which may offer both group guidance and the teaching of study skills.

Advocating

Negotiating directly with institutions or agencies on behalf of individuals or groups for whom there may be additional barriers to access or to learning (e.g. negotiating exceptional entry arrangements or modifications to courses).

Feeding back ¹⁴

Gathering and collating information on unmet, or inappropriately met, needs, and encouraging providers of learning opportunities to respond by developing their provision. This may involve practical changes (e.g. changing the presentation of course information or changing timetables) or curricular ones (e.g. designing new courses for new client groups, or changing the way in which existing courses are taught to make them more appropriate for adult learners). ⁴

In practice the seven activities are closely interrelated. Thus, for example, the choice of what information to present to a client, and how to do so, itself involves an 'assessment' of that client, whether or not this is consciously done. In the same way, the confidence-building role of the 'enabler' often depends upon counselling skills.

Without an adequate base of information none of the activities is possible, but a service which seeks only to provide information cannot, in any adequate way, meet the guidance needs of its clients.

... information, in educational guidance, is not neutral. It is not as simple as passing information from education providers to the enquirer for him/her to make choices. Advice and counselling workers have a responsibility to assess and if necessary challenge the information and publicity given out by course providers. They have to make judgements about different courses and institutions, based on the past experiences of their enquirers. Of course they must be aware of the dangers of passing on their own prejudices, nevertheless they cannot evade this responsibility. (EGSA Worker) ¹⁰

Educational Guidance Workers

Educational guidance is carried out by a variety of people, working in a variety of agencies. In this chapter the term 'educational guidance worker' is used to describe all such staff, whether paid or unpaid, and regardless of the agency within which they work. The term relates to the roles undertaken, rather than to the employing agency.

While some workers are employed exclusively in educational guidance, for many others this will only constitute a part of their work (as, for example, training or careers officers, librarians or advice workers in voluntary agencies). Many will only undertake a limited range of guidance activities, and some will only work with particular client groups.

Enquirer C is 32 and lives with her husband and young children in an inner city area. She was educated to degree level in Pakistan, but has found that her qualifications are not accepted as degree level in Britain. She wants to become a librarian.

The Agencies Involved ¹⁵

Many agencies are involved in educational guidance. Some offer, or would wish to offer, the full range of educational guidance activities to any adult. Others, on the other hand, are more specialised, offering guidance only to some groups; or only in relation to some kinds of opportunity... Others will provide only a limited range of guidance activities. This variety, in so far as it reflects genuine variation in local needs and circumstances, is both inevitable and desirable and this chapter therefore proposes the creation of networks for educational guidance which will bring all the various agencies into a closer collaboration without impinging on their legitimately different interests, skills and expertise.

It is possible to identify a number of key agencies which must inevitably be involved in the provision of educational guidance for adults. All are already engaged to some extent in this work (although not all offer the full range of guidance activities), and this should continue to be the case.

3 ACCESS, NETWORKS AND PRINCIPLES ² 18

Access to Educational Guidance

Although no quantitative evidence about the need for guidance exists, circumstantial evidence is impressive. Our Careers Service for example, having never publicised availability to adults was providing guidance interviews for 500 per year in 1978 and, as a result of demand, had to withdraw its adult guidance facility in the County in 1979. (Principal Careers Officer of a Shire County) ²¹

If educational guidance is to extend adult access to education then guidance itself must be accessible. ⁴ This implies that basic information about where and how guidance is available must be very widely distributed, and that it will be necessary to develop an extensive range of 'contact points', where simple information is on display, or where appropriate individuals know how to make contact with guidance agencies. The use of a nationally recognised symbol for educational guidance could play a useful part in this.

At a number of points educational guidance will be directly available on a full or part-time basis to clients who drop in or attend by appointment. These we have called 'Guidance Points', and they will form the first point of contact between a potential learner and a guidance worker. Guidance points will be provided by a variety of agencies, and within the area of a Local Authority might include:

- ▶ the *High Street* premises of an independent educational guidance service for adults (EGSA) offering the full range of activities six days a week;
- ▶ an *employer* offering employees, on site, a full range of guidance about employment-related learning;
- ▶ a *library* offering information, advice and support to independent learners;
- ▶ a *college* offering information, advice, counselling and enabling to its own students or potential students;
- ▶ a *Jobcentre* offering only information and advice about MSC (16)-funded courses;
- ▶ a *careers service* offering education and training information through its Careers library;
- ▶ a *voluntary organisation* working with physically disabled adults, offering the full range of activities to their own clients on a home visiting basis;

- ▶ a *community centre*, or a *Citizens Advice Bureau*, where an educational guidance service offers a weekly advice session;
- ▶ a *community information bus*, visiting outlying or rural communities on a regular basis with educational guidance staff;
- ▶ a *local radio station* providing advice through a 'phone in' service, either on or off air.

This list is intended as an illustration of some possibilities – many other kinds of guidance points already exist, and others will no doubt be created in the future. It seems certain that, at some stage, some form of computer-assisted systems will be developed, and will add dramatically to the number of people who can be reached by some form of guidance.

All these are points where clients can go to find guidance. In addition, guidance workers will go out to provide guidance to groups in a variety of locations.

We are much concerned with the difficulties in organising a service to meet rural need, where the population is dispersed in small settlements with inadequate transport... The priority of actual provision in rural areas means that counselling can often not arrive at identifying an educational opportunity, but its absence. The feedback role from educational guidance in the rural situation may therefore often be different, and in some ways more difficult. (Organiser of part-time EGSA)

A Local Educational Guidance Network

If educational guidance for adults were concerned only with formal course provision in the public sector, and if the learning needs of adults were homogeneous and predictable, it would be possible to propose the creation of a single new agency to provide a universal service of educational guidance. There are, however, almost as many different learning needs as there are adults, and more than half the formal learning opportunities available to adults are provided outside the public sector. Some are extremely difficult to find, or only of relevance to a very limited clientele. If the educational guidance needs of adults are to be met effectively it will be necessary to call upon a wide range of different skills and

knowledge, some of which are very specialised. It would be uneconomic for a single agency to try to develop a universal expertise when other agencies are already well established and are in touch with the particular client groups concerned. Clients, for their part, will seek guidance from the agencies which they know and trust, whether or not the particular agency is best equipped to deal with the issue. Only if that agency in its turn knows and trusts other agencies with relevant expertise will the client be likely to receive the best service possible.

It follows that, if the diverse skills and knowledge available are to be used to the maximum benefit of learners and potential learners, some form of network will be needed to link the various agencies which already provide a range of educational guidance in most parts of England and Wales (albeit sometimes on a very limited scale). An educational guidance network is such a group of agencies and individuals providing educational guidance in a given area. By formalising their relationships they can more readily assess how far the full range of educational guidance needs are being met, and whether, by a sharing of expertise or information, they could improve the range or quality of the service which they jointly offer.

On an informal basis many such networks already exist, although they most commonly rest on personal contacts and on structures designed for other purposes. While informal relationships are essential to guidance they cannot provide a reliable basis for a permanent service, since they depend on chance encounters and on the commitment of particular individuals. Only in very exceptional cases can they produce the full range of skills and knowledge which potential learners may need to call on, and they cannot ensure that all the relevant agencies are fully involved. The development of a stable, effective, comprehensive and coherent service of educational guidance, therefore, calls for the creation of more formal networking arrangements.

An educational guidance network should seek to provide a comprehensive service, both by offering the full range of guidance activities and by offering them to all adults in its area. This does not, of course, imply that any single agency will necessarily be, or seek to be, comprehensive, although some EGSA's should wish to achieve this. Specialisation is both proper and consistent with the concept of networking, since a network is by definition a gathering of agencies with complementary skills and knowledge, where clients can be confident that any guidance point will be able to put them in touch with the agency best equipped to deal with their particular circumstances or needs. For their part, agencies can concentrate on what they do best and are freed from the necessity to try to hold all information and possess all professional skills. Thus, by collaborating, the partners can ensure that their special skills and knowledge are most effectively used both to meet existing, known needs and to tackle new, or unmet, ones.

The role of teachers and... volunteer tutors in basic education as providers of advice and guidance is likely to be particularly crucial. Many adults receiving help with basic education will rely on someone they are familiar with and trust to provide advice and guidance on learning opportunities, rather than seek, or be prepared to accept, advice and guidance from a perhaps more knowledgeable, yet distant, specialist. A 'barefoot doctor' approach will perhaps be the most effective method of ensuring that such adults receive advice and guidance, initially alongside information about more comprehensive services available locally, and encouragement to use them. (Adult Literacy and Basic Skills Unit)¹⁷

The Objectives of a Network [The Principles]^{2 18}

While different agencies will play different parts they will need to agree a common policy for the network as a whole. A comprehensive service will need, at least, to ensure a provision of guidance which embraces all seven of the guidance activities, and is:

► Client centred

The primary concern of the network should be the learning needs, wishes and interests of the adult population of its area, and its organisation and management should reflect this.

► Confidential

Information received or recorded about clients, their personal circumstances and learning needs should be treated as confidential, and should not be conveyed to third parties without agreement.

► Open to all adults

Different agencies will have different approaches to the definition of an 'adult', but for the purpose of the network this should embrace all those who have completed their initial education, at whatever age. We recognise that, within the network there will be agencies, like the careers service, whose brief extends into initial education, and that they will continue to work with this broader age range. We believe, however, that the concern of an 'adult' network must be to ensure that the needs of adults, as defined above, are met.

► Accessible to all adults

This implies a service both physically accessible in terms of location, opening hours and outreach, and psychologically accessible to those who may be reluctant to approach formal institutions.

► Freely available to all adults

Since guidance exists to make learning more accessible, especially to those whose previous experience of it has been least positive, a charge for guidance would be yet another barrier to access. Despite this we recognise that some agencies do charge some clients for personal, educational or vocational guidance, and this is likely to continue. If access is to remain genuinely open the norm should be that the service is free to clients, and it should be perceived as such by the public (as is the public library service, although many libraries charge for some parts of their service).

► Independent in its advice

The network should seek to ensure that all guidance given is based on the needs of the client, and not distorted by the needs of the education or training providers or members of the network.²³

► Publicised widely

A service which is not known about is not accessible. Many agencies currently avoid publicity as a means of preventing overload on staff or resources. This is likely to lead to a service biased in favour of particular client groups, either those most able to seek guidance, or those seen as the highest priority by particular workers. In either case the result is not a comprehensive and accessible service.

► Able to contribute to the development of learning opportunities

A guidance agency will be unable to meet the needs of many of its clients if it can only offer access to those learning opportunities... [which already exist. It needs to be able to feed back information and ideas to education providers]¹⁹ ... as it identifies changing or unmet needs. This will call for close working relations between guidance workers and the providers of education and training at appropriately senior levels.⁴

In addition to meeting these criteria, an educational guidance network will need to be supported by a comprehensive base of information on learning opportunities available to adults, including opportunities available outside the immediate area. It will also be important that the network has access to information about employment opportunities and trends and about grants, benefits and other support facilities and regulations which affect the accessibility of education for many adults.

Mr D is about to be made redundant from a semi-skilled job in engineering. He was born in Eastern Europe and arrived in Britain after traumatic experiences. His wife is dead and he lives alone. He speaks but does not write English. He wants help in filling in forms so that he can apply for jobs.

4 RECOMMENDATIONS ²²

In view of our belief that expenditure on educational guidance for adults is an essential investment in the quality of a skilled, knowledgeable adaptable and creative adult population we make the following... [general]... recommendations:

All those concerned with the education and training of adults should take appropriate steps, over a period of years, to create a comprehensive service of educational guidance for adults in England and Wales.

Such a service should have two complementary aims:

- a. To ensure that all adults are encouraged and assisted to engage in formal or informal learning, whether related for work-related or personal development reasons;
- b. To assist providers of education and learning in the public, private and voluntary sectors to develop learning opportunities which are appropriate, in both content and delivery, to the needs and interests of adults.

The service should be provided on a collaborative basis, building on existing skills and expertise of many agencies (public, private and voluntary, and including employers) already providing some form of educational guidance.

The service should be:

- client centred
- confidential
- open and accessible to all adults
- freely available
- independent in its advice
- widely publicised
- able to contribute to the development of education and training.

The service should be an integral component of the total provision of education and training, and should be financed as such, recognising that expenditure on guidance can lead to more effective use of the total resources devoted to adult learning.

Notes

1. UDACE was the Unit for the Development of Adult Continuing Education in England and Wales created by the Secretary of State for Education and Science in 1984. The Unit examined areas of possible development in education for adults and recommended strategies for development. The Unit in its work sponsored projects to encourage development. In 1992 the then DES decided to merge the Unit with FEU. For a recent account of the work of UDACE see McNair S (2002) 'UDACE – Unit for the Development of Adult Continuing Education' in Gilbert H and Prew H *A Passion for Learning: celebrating 80 years of NIACE support for Adult Learning*, Leicester: NIACE.
2. In this paper an attempt has been made to separate discussion of the purpose, place and nature of guidance from the context in which *The Challenge of Change* placed it. What appears here is taken in the main from three central chapters together with *Recommendations* from Chapter 1 of the original report. There are relatively few changes to Chapters 2 and 3 of the original as these contain the development of the main ideas and the activities of guidance. These chapters appear here as:
 - Section 1 **Education, Training and Guidance**
 - Section 2 **The Nature of Educational Guidance**

The third section on access and networks is taken from Chapter 5 and is subject to considerable amendment. This section contains important discussion of the principles of guidance though these are developed as 'The objectives of a network'. The truncated Chapter 5 appears as:

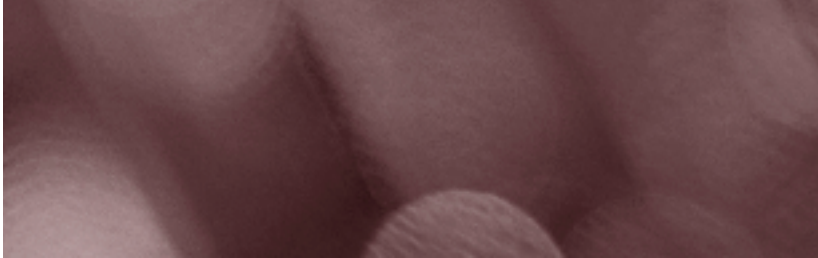
 - Section 3 **Access, Networks and Principles**, and
 - Section 4 **Recommendations** is taken from the general recommendations section of Chapter 1

The current Occasional Paper covers similar grounds to the version republished for the Open University in 1998. This can be found as UDACE (1998) 'The Challenge of Change' in EDWARDS R, HARRISON R and TAIT A (Eds.) *Telling Tales: Perspectives on Guidance and Counselling in Learning*, London: Routledge. This volume was published for Open University Course E839 *Guidance and Counselling in Learning* which is a part of the Masters in Education Programme.
3. This paragraph has a contemporary ring as the policy of Government from the late 1990s has emphasised the need to counter social exclusion.
4. Emphasis added.
5. *The Challenge of Change* was produced by UDACE after a process of consultation. At various points in the text, quotes from respondents were inserted to illustrate issues. The consultation was triggered by an earlier UDACE (1985) document *Helping Adults to Learn: a consultative document on Educational Guidance for Adults*, Leicester, NIACE for UDACE.
6. In seeking to assert the autonomy of the individual this section of *The Challenge of Change* may underestimate the role of, and need for, group guidance. The autonomy point is nevertheless important and is made very clearly in McNAIR S (1996) *Putting Learners at the Centre: reflections from the guidance and learner autonomy in HE Programme*, Sheffield, DfEE p. 12. 'Guidance is not about telling people what to do: rather it is a process of finding and interpreting evidence, self exploration, planning and review. Above all it is a process of helping individuals to take control of their own decisions and to make decisions wisely'.
7. The original text reads "... about whether the need is for 'education' or 'guidance'...". This obviously a mistake in the original so guidance has been replaced by 'training' to correct the position.
8. The section on Education and Training was omitted from the 1998 edited version. (See endnote 2 above).
9. In later works it has been usual to formulate these four phases as:
 - **Pre-entry**
 - **Entry**
 - **On-programme** (sometimes *On-course*)
 - **Exit**

See for example Sadler J and Atkinson K (1998) 'Managing Guidance in FE' in EDWARDS R, HARRISON R and TAIT A (Eds.) *Telling Tales: Perspectives on Guidance and Counselling in Learning*, London: Routledge, 138-152.
10. Many of the early services were developed by Educational Guidance Services for Adults (EGSAs). An EGSA worker was a guidance worker.
11. Since *The Challenge of Change* was published in 1986, there has been much discussion of the use of counselling as one of the seven activities of guidance. There are several problems here. Some are over the meanings of the words we use whilst others are about practice and training. Since 1986 counselling has become increasingly professionalised with programmes of appropriate and professional training of the counsellor. There is no doubt however, that the effective guidance worker has to use **skills** from counselling practice. The guidance worker requires defined capability in the areas of: attending, responding, and understanding. If *The Challenge of Change* were being drafted today it is likely that the *counselling* activity would be reformulated as **Using Counselling Skills**.
12. UDACE published a series of documents and reports on adult guidance after the publication of *The Challenge of Change*. In terms of the **Assessing** activity the publication was Jennifer Kidd (1988) *Assessment in Action: a manual for those engaged in Educational Guidance for Adults*, Leicester: NIACE for UDACE. In the manual Kidd stresses that assessing is an inevitable informal process in guidance work and that in particular:

'Assessment is not labelling... assessment is not some form of treatment, mechanically applied. Rather it should provide a means of helping clients themselves gather and make use of information...'

Assessment is not simply 'testing'... We all form impressions of others by just being with them, though in everyday life we do not call these impressions assessments. Impressions arise out of our perceptions of appearance, behaviour and speech... [in our work we gather these



impressions for two purposes]... to help people themselves make decisions about their lives, or... to help others make decisions about them. We are concerned here with assessment in guidance, not as part of any selection process.

The varied nature of practice A notable feature of the work of many of the practitioners I talked to was the diversity of assessment techniques used... A mixture of techniques was often found most useful and the tools chosen vary according to the particular client, and his or her specific needs, and the resources available.' (Pp3-4)

13. Working at much the same time as the UDACE Development Group, Diane Bailey used a different term for the *Enabling* activity. She used *Coaching* which was defined as: *'Creating or structuring a learning experience so that the individual can practise and gain new knowledge, skills or perceptions.'* (p. 90) BAILEY, D. (1987) *Guidance in Open Learning: a manual of practice*, Cambridge: NICEC and MSC.
14. Another report by UDACE on Guidance following *The Challenge of Change* (see note 12) was on the Feeding back activity. The report here was Oakeshott M (1990) *Educational Guidance and Curriculum Change*, Leicester and London: NIACE and FEU for UDACE.
15. In this section, the original report listed the sorts of agencies then involved in educational guidance with brief descriptions of their roles. These included EGSA's, Libraries, Careers Services, Local Education Authorities, Training Providers, Employers, Educational Institutions, Trade Unions and Voluntary Organisations. As a result much of this sub-section has been omitted in this version as many in the 1986 list of agencies are no longer appropriate.

16. Manpower Services Commission, which later became the Training Agency and is now a part of the Department for Education and Skills.
17. This is now the Basic Skills Agency.
18. These objectives have, in the period since 1986, been used in a variety of ways to develop the **principles of guidance** and to develop Codes of Professional Conduct. Perhaps the most surprising feature of the 1986 list is that there is no reference to equality of opportunity.
19. In the original text the words inserted here were omitted in error (correspondence Brown-McNair, 1992).
20. At the start of each chapter in the 1986 text is a list of the subsections to be covered in the chapter. This listing gives fuller sub-section titles than those used later in the chapter. In this version the longer sub-section titles are used in the actual text as this aids comprehension.
21. In the 1986 text this quotation appears in Chapter 4. It is thought helpful to place it at the head of the section on access.
22. Section 4 of this paper is taken from Chapter 1 of the 1986 report pp10-11 which was the *Summary and Recommendations*. The section used here contains the general recommendations and it is thought that it will provide an appropriate conclusion to the Occasional Publication.
23. The independence principle has been widely discussed since 1986 and this term is now rarely used. In most cases it has been superseded by **impartiality**.

The National Association of Guidance for Adults (NAEGA) brings together diverse organisations and individuals providing guidance for adults across the UK.

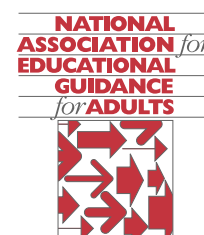
A network of seven local branches complements a range of activities at national level managed by an elected Board. NAEGA provides the opportunity to:

- Influence policy makers and contribute to professional debate and discussion
- Keep up-to-date with public policy developments in guidance
- Update knowledge and understanding of good practice at competitive prices
- Link into local networks through the NAEGA branches.

NAEGA publishes a quarterly magazine 'News and Views', available on subscription, and a website featuring current news and information.

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