| Information, Advice and Guidance (IAG) Policy | |
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| **Policy prepared by** | Director of Quality, Compliance & Excellence |
| **Approved by** | Educationwise Board |
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**Policy statement**

Educationwise is committed to providing accessible, accurate and impartial information, advice and guidance to learners, prospective learners and employers.

IAG will help individuals:

- Understand the learning and career options available to them
- Select a suitable programme
- Make informed decisions
- Identify support needs
- Understand programme expectations
- Develop their employability and career-management skills
- Plan their progression into employment, further learning or greater responsibility
- Access specialist or independent support where Educationwise cannot meet their needs directly

Educationwise will place the interests, needs and aspirations of the individual at the centre of its IAG services.

Commercial targets, funding opportunities or programme availability must not result in someone being encouraged to enrol on an unsuitable programme.

**Purpose**

The purpose of this policy is to explain how Educationwise will:

- Provide consistent and high-quality IAG
- Assess whether programmes are suitable for individuals
- Ensure information is accurate and current
- Provide clear information about costs, funding and programme requirements
- Support progression and career development
- Provide inclusive and accessible services
- Refer individuals to appropriate external support
- Protect personal and confidential information
- Monitor the quality and impact of IAG
- Meet applicable funding, inspection and matrix Standard requirements

**Scope**

This policy applies to:

- Apprenticeships
- Advanced Learner Loan-funded provision
- Commercial qualifications and courses
- Prospective learners
- Current learners and apprentices
- Employers
- Parents, carers and representatives where appropriate
- Directly delivered provision
- Subcontracted provision

It applies to:

- Business development and employer-facing staff
- Admissions and enrolment staff
- Programme Coordinators
- Tutors, trainers and assessors
- Internal quality assurers
- Learning support staff
- Safeguarding staff
- Managers and senior leaders
- Associates and contractors
- Subcontractors and their staff
- Anyone providing information, advice or guidance on behalf of Educationwise

**The matrix Standard**

Educationwise holds the matrix Standard for the quality of its information, advice and guidance services.

The matrix Standard is owned by the Department for Education and supports organisations to assess and improve their management and delivery of IAG. Its seven elements are purpose, resource, offer, delivery, outcomes for individuals, impact for organisations and continuous improvement.

Educationwise will use these principles to monitor and continuously improve its IAG services.

**Definitions**

**Information**

Information means providing accurate and relevant facts about matters such as:

- Programmes and qualifications
- Entry requirements
- Learning methods
- Programme duration
- Assessment
- Costs and funding
- Progression routes
- Employment opportunities
- Support services

**Advice**

Advice helps an individual understand and interpret information so they can consider the options available to them.

**Guidance**

Guidance is a more detailed process that helps an individual explore their circumstances, abilities, aspirations and options before reaching their own informed decision.

**Careers information, advice and guidance**

Careers IAG helps individuals understand employment opportunities, career pathways, required skills and qualifications, labour-market information and possible next steps.

**Principles of IAG**

**Impartiality**

IAG will be based on the interests and needs of the individual.

Staff must:

- Explain the available options honestly
- Avoid placing inappropriate pressure on someone to enrol
- Be open about the programmes Educationwise can and cannot offer
- Explain any limitations to the information or guidance being provided
- Signpost other providers or services where this would better meet the individual's needs

Advice should not be influenced improperly by funding availability, recruitment targets, employer pressure or personal interests.

**Accessibility**

IAG will be provided in a way that is accessible and appropriate to the individual.

Educationwise will consider:

- Disability
- Special educational needs
- Learning difficulties
- Language or communication needs
- Digital access
- Age and understanding
- Personal circumstances
- Employment commitments
- Previous educational experience

Reasonable adjustments will be made where required.

**Accuracy**

Information must be:

- Current
- Clear
- Factual
- Relevant
- Consistent with programme and funding requirements

- Within the knowledge and competence of the person providing it

Staff must check information where they are unsure and must not make promises about funding, achievement, employment or progression outcomes that cannot be guaranteed.

**Confidentiality**

Personal information shared during IAG will be treated confidentially and handled in line with Educationwise's Data Protection Policy.

Information may be shared without consent where this is necessary to:

- Protect the individual or another person
- Meet a safeguarding duty
- Comply with the law
- Meet a funding or regulatory requirement
- Prevent or investigate serious wrongdoing

The individual will be informed about the limits of confidentiality where appropriate.

**Individual focus**

IAG will reflect the individual's:

- Knowledge and experience
- Existing qualifications
- Career aims
- Employment situation
- Job role
- Support needs
- Barriers to learning
- Preferred progression route

**Equality**

Educationwise will provide IAG fairly and without unlawful discrimination.

Staff must challenge assumptions and avoid directing individuals towards or away from an option because of a protected characteristic, background or personal circumstance.

**Informed choice**

The purpose of IAG is to support the individual to make their own informed decision.

Staff should not make the decision for them.

**Responsibilities**

**Chief Executive Officer**

The Chief Executive Officer has overall executive accountability for ensuring Educationwise maintains effective and properly resourced IAG arrangements.

**Director of Education and Delivery**

The Director of Education and Delivery is responsible for:

- Ensuring IAG is embedded throughout teaching and learning
- Ensuring delivery staff understand their responsibilities
- Ensuring progression is discussed throughout the learner journey
- Ensuring tutors have access to current programme and career information
- Addressing identified weaknesses in delivery

**Director of Quality and Compliance**

The Director of Quality and Compliance will provide oversight through:

- Quality assurance
- Policy review
- Learner and employer feedback
- Complaints and appeals
- Observation and review activity
- Progression and destination information
- The matrix Standard
- Risk and improvement arrangements

**Business development and employer-facing staff**

Staff working with prospective learners and employers must:

- Provide accurate information about programmes
- Explain eligibility and entry requirements
- Avoid making unsupported promises
- Identify the individual's intended outcomes
- Confirm that the proposed programme appears relevant
- Escalate concerns about suitability
- Explain costs and funding arrangements clearly
- Refer the individual to another service where appropriate

**Programme Coordination and MIS teams**

The Programme Coordination and MIS teams will:

- Provide accurate information about enrolment and programme requirements
- Support eligibility and evidence checks
- Explain required documentation
- Support learners to access Educationwise systems
- Record relevant information accurately
- Escalate support or suitability concerns
- Provide guidance about administrative next steps

**Tutors, trainers and assessors**

Tutors, trainers and assessors will:

- Provide ongoing IAG relevant to the learner's programme
- Discuss progress, aspirations and next steps
- Relate learning to the learner's job role and career

- Identify barriers and support needs
- Provide current information about progression routes
- Signpost specialist support where required
- Record significant discussions and agreed actions
- Avoid providing guidance outside their knowledge or competence

**Employers and workplace mentors**

Employers and workplace mentors are expected to:

- Support the individual's development
- Participate in apprenticeship progress reviews
- Provide suitable opportunities to apply learning
- Discuss workplace progression
- Raise concerns about programme suitability or progress
- Avoid placing inappropriate pressure on the learner's decisions

**Quality and Compliance Team**

The Quality and Compliance Team will:

- Monitor the quality and consistency of IAG
- Review learner and employer feedback
- Check that programme suitability is considered
- Review relevant records and learner journeys
- Identify themes and improvement actions
- Support preparation for matrix Standard reviews
- Escalate significant weaknesses through the relevant governance arrangements

**All staff**

All staff providing IAG must:

- Act honestly and impartially
- Work within their level of knowledge and competence
- Use approved and current information
- Maintain confidentiality
- Record significant information appropriately
- Declare conflicts of interest
- Complete relevant training and development
- Refer individuals for specialist support where necessary

Staff must not describe themselves as a qualified careers adviser unless they hold an appropriate qualification and are authorised to provide that service.

**IAG before enrolment**

Before enrolment, prospective learners should receive sufficient information to understand:

- The programme title and level
- Entry requirements
- Programme content

- Delivery arrangements
- Expected duration
- Attendance and engagement expectations
- Assessment arrangements
- English and maths requirements where applicable
- Employer involvement where applicable
- Costs and funding arrangements
- Learner commitments
- Available support
- Potential progression routes
- Complaints and withdrawal arrangements

The information provided should enable the person to decide whether they wish to proceed with the application and initial assessment.

**Programme suitability**

Educationwise will take reasonable steps to establish that the proposed programme is suitable for the individual.

This will include consideration of:

- Their starting point
- Existing knowledge, skills and experience
- Previous qualifications and learning
- Career objectives
- Current or intended job role
- Ability to meet programme requirements
- Support needs
- Likely benefit from the programme
- Available alternatives

Where a programme is not suitable, Educationwise will explain the reason and, where possible, provide information about alternative options.

An individual must not be enrolled solely because funding is available.

**Apprenticeship initial assessment and IAG**

For apprenticeships, Educationwise will use the initial assessment and IAG process to establish that:

- The individual and programme meet funding eligibility requirements
- The apprenticeship is appropriate for the individual
- The job role has a clear and substantial link to the apprenticeship
- The apprenticeship will provide significant new knowledge, skills and behaviours
- Relevant prior learning and experience have been identified
- Any required learning support has been considered
- English and maths requirements have been explained
- The learner, employer and provider understand their responsibilities

- Costs and any employer contribution have been explained

The outcome must be discussed or shared with the learner and employer and used to inform a tailored training plan. Current apprenticeship funding rules require the provider, employer and apprentice to agree that the apprenticeship is appropriate and that prior learning, job-role alignment and support needs have been considered.

**Advanced Learner Loan and commercial-course IAG**

Before enrolment on an Advanced Learner Loan-funded or commercial programme, Educationwise will discuss matters including:

- The individual's reasons for choosing the course
- Their current employment situation
- Previous qualifications and experience
- Career goals
- Intended next steps
- Course content and requirements
- The likely benefit of the programme
- Costs, payment or loan arrangements
- Available alternatives
- Any additional support required

Where a course is being funded through an Advanced Learner Loan, learners must receive accurate information about the loan and should be directed to the relevant official information where further financial guidance is required.

Educationwise staff will provide information about funding arrangements but will not provide regulated financial advice.

**Enrolment and induction**

During enrolment and induction, learners will receive information about:

- Their programme and learning plan
- How teaching and assessment will be delivered
- Attendance and engagement expectations
- Progress reviews
- Off-the-job training where applicable
- English and maths
- Reasonable adjustments and learning support
- Safeguarding and wellbeing support
- Complaints and appeals
- Programme systems, including Maytas, Blossom and other relevant platforms
- Tutor and support contacts
- Career development and progression opportunities

Information should be reinforced throughout the programme and not treated as a single activity completed at induction.

**Initial assessment and support needs**

Educationwise may use information and assessment tools including:

- Previous qualification evidence
- Skills scans
- Programme-specific assessments
- PASS Functional Skills
- Cognassist
- Learner discussions
- Employer information
- Support-needs assessments

Assessment tools will be used alongside professional discussion and will not be treated as the only evidence of suitability or need.

The learner will be informed about how the results affect their programme and support arrangements.

**IAG during the learner journey**

IAG will be available throughout the programme.

This may include:

- Tutor discussions
- One-to-one support
- Progress reviews
- Workplace reviews
- Target setting
- Curriculum activities
- Masterclasses
- Employer engagement
- Employability activities
- Blossom learning and personal-development resources
- Referrals to specialist support

IAG should help learners understand:

- Their progress
- The purpose of their learning
- Areas for development
- How learning applies to their role or career
- Available progression routes
- What they need to do next

**Apprenticeship progress reviews**

Apprenticeship progress reviews will normally take place in line with Educationwise's planned review cycle.

Reviews will provide an opportunity to discuss:

- Progress against the training plan
- Learning completed
- Workplace application
- Off-the-job training
- English and maths where applicable
- Support needs
- Changes in circumstances
- Career aims and progression
- Actions before the next review

Current apprenticeship funding rules normally require progress reviews at least every three calendar months. Any approved alternative arrangement must be agreed in advance and reviews must not be more than six months apart.

**Careers and progression guidance**

Learners will receive information and guidance about relevant next steps, which may include:

- Progression within their current employment
- Additional responsibility
- Higher-level qualifications
- Further education
- Higher education
- Other apprenticeships
- Professional qualifications
- Employment opportunities
- Self-employment
- Continuing professional development

Guidance should take account of the learner's interests, aspirations, abilities and circumstances.

Ofsted's current expectations for further education and skills providers include structured and tailored careers guidance, employability development, work-related learning and helping learners understand progression routes, particularly where they face disadvantage or other barriers.

**Labour-market information**

Where appropriate, learners will be supported to access current information about:

- Job roles
- Skills requirements
- Salary expectations
- Recruitment methods
- Local and national employment opportunities
- Sector developments
- Progression pathways

- Professional expectations

Information may be obtained from:

- Employers
- Sector and professional bodies
- Government sources
- Awarding organisations
- Labour-market information services
- Recruitment and vacancy information
- Educationwise's employer network

Staff should explain where information may change and encourage learners to check current sources before making a significant decision.

**Employer IAG**

Educationwise will provide employers with accurate information about:

- Programme suitability
- Apprenticeship and qualification requirements
- Employer responsibilities
- Funding and costs
- Off-the-job training
- Progress reviews
- Workplace support
- Assessment
- Reasonable adjustments
- Learner progression
- Available programmes and pathways

Educationwise will avoid recommending a programme that does not align with the individual's job role, development needs or intended outcomes.

**Impartial external guidance and referrals**

Educationwise recognises that its own staff may not always be best placed to provide specialist or fully independent guidance.

Individuals may be signposted or referred to:

- The National Careers Service or its successor government careers service
- Other education and training providers
- Higher education providers
- Professional or sector bodies
- Jobcentre Plus or its successor service
- Specialist employment services
- Local authority services
- Financial support or debt-advice services
- Health, wellbeing or safeguarding services
- Specialist SEND or disability support

- Trade unions or professional representatives
- Other appropriate community services

The National Careers Service currently provides free and impartial careers information, advice and guidance to adults and young people aged 13 and over. A new government jobs and careers service is due to begin from October 2026, so references and links should be reviewed as this transition takes place.

A referral should be made where:

- The issue is outside the member of staff's knowledge or authority
- Specialist qualifications or expertise are required
- There is a conflict of interest
- The individual requires independent guidance
- Safeguarding or wellbeing support is needed
- The person's needs cannot reasonably be met by Educationwise

**Learners requiring additional support**

Educationwise will take steps to ensure learners with additional needs are able to access and understand IAG.

This may include:

- Adjusted communication
- Additional time
- Alternative formats
- Support from an authorised representative
- Assistive technology
- Repeated or simplified explanations
- Specialist referral
- Additional one-to-one guidance

Staff should avoid making assumptions about an individual's aspirations or capabilities.

**Learners under 18**

Information and guidance for learners under 18 will be:

- Appropriate to their age and understanding
- Focused on their best interests
- Clear about available education, employment and training options
- Sensitive to safeguarding and parental involvement
- Consistent with participation requirements

Where a learner under 18 leaves their programme early, Educationwise will follow any applicable notification and support requirements and provide information about suitable next steps.

Government guidance states that education and training providers have duties relating to notifying local authorities where a young person stops participating before completing their programme, so that support to re-engage can be considered.

**Early leavers and learners at risk of withdrawal**

Where a learner is considering withdrawal, Educationwise will seek to understand:

- The reason for the proposed withdrawal
- Whether support or reasonable adjustments could help
- Whether a break in learning or other approved arrangement is appropriate
- Whether the programme remains suitable
- The learner's intended next step
- Whether further IAG or specialist support is required

The learner must not be pressured to remain on an unsuitable programme.

Where the learner leaves, Educationwise will provide appropriate information about alternative learning, employment or support options and record the intended destination where possible.

**Completion, exit and next steps**

Before or at completion, learners should be supported to consider:

- What they have achieved
- How their knowledge and skills have developed
- Their current employment position
- Their career aims
- Further training or qualifications
- Job or promotion opportunities
- Continuing professional development
- Any ongoing support required

Completion IAG should include clear next steps and signposting where appropriate.

**Destination information**

Educationwise will seek to understand the destinations and progression of learners following completion or withdrawal.

This may include:

- Sustained employment
- Promotion or increased responsibility
- A new job
- Further or higher learning
- Another apprenticeship
- Self-employment
- Voluntary work
- Unemployment or another outcome

Destination information will be used to:

- Understand the impact of provision
- Improve programme design
- Strengthen IAG

- Identify progression trends
- Inform the Self-Assessment Report and Quality Improvement Plan
- Provide evidence for the matrix Standard and inspection

Current careers guidance encourages providers to evaluate careers provision using stakeholder feedback and progression or destination information.

**Records**

Significant IAG activity should be recorded within the appropriate Educationwise system.

Records may include:

- Initial IAG discussions
- Programme-suitability decisions
- Initial assessment outcomes
- Support needs
- Progression discussions
- Referrals and signposting
- Progress-review actions
- Intended and actual destinations
- Employer discussions
- Complaints or concerns

Records should be:

- Accurate
- Relevant
- Factual
- Proportionate
- Stored securely
- Available only to authorised staff
- Retained in line with Educationwise's retention arrangements

**Conflicts of interest**

Anyone providing IAG must declare any personal, professional or financial interest that could affect their impartiality.

Conflicts will be managed in line with Educationwise's Conflict of Interest Policy.

Where a conflict cannot be managed appropriately, another person or external service should provide the guidance.

**Complaints and concerns**

An individual who is dissatisfied with the IAG they have received may:

- Raise the matter with the member of staff
- Contact the relevant manager
- Use the Learner Appeals and Complaints Policy
- Contact the Complaints Lead

Complaints will be considered fairly and will not disadvantage the learner.

Where the concern involves safeguarding, discrimination, data protection or misconduct, it will also be considered under the relevant policy.

**Staff competence and development**

Staff involved in IAG will receive suitable:

- Induction
- Programme information
- Funding and eligibility updates
- Safeguarding training
- Equality and inclusion guidance
- Data protection training
- Career and progression information
- System guidance
- Continuing professional development

Managers will identify where additional training or specialist knowledge is required.

Staff providing specialist careers guidance should have suitable competence or qualifications for the level of service being provided.

**Quality assurance**

Educationwise will monitor the quality of IAG through:

- Learner surveys
- Employer surveys
- Staff feedback
- Learning observations
- Review observations
- Learner interviews and case studies
- File and record sampling
- Complaints and appeals
- Destination and progression information
- Retention and achievement information
- Internal quality assurance
- Self-assessment and quality-improvement activity
- Matrix Standard reviews

Monitoring will consider whether IAG is:

- Accessible
- Accurate
- Impartial
- Timely
- Consistent
- Relevant
- Properly recorded

- Having a positive impact

**Monitoring and governance**

The Director of Education and Delivery is responsible for the operational implementation of this policy.

The Director of Quality and Compliance will provide oversight of quality, consistency and improvement.

Significant concerns, risks or actions may be reported through:

- Senior Leadership Team meetings
- Quality and Compliance Committee
- Relevant risk registers
- Master Risk Committee
- The Board

Actions identified through feedback, audit, inspection or matrix Standard reviews will be assigned to an owner and monitored to completion.

**Related policies and procedures**

This policy should be read alongside:

- Learner Appeals and Complaints Policy
- Equality Policy
- Safeguarding and Prevent Policy
- Data Protection Policy
- Privacy Policy
- Reasonable Adjustment and Special Consideration Policy
- Initial Assessment arrangements
- Apprenticeship Training Plan process
- Learner Recognition of Prior Learning Policy
- Conflict of Interest Policy
- Learner Code of Conduct
- Subcontracting Policy
- Quality Improvement Plan
- Self-Assessment Report

**Review**

This policy will be reviewed annually or sooner where there is:

- A change in funding requirements
- A change to inspection expectations
- A change to the matrix Standard
- A significant complaint or concern
- A change in Educationwise's programmes or systems
- Evidence that IAG is not consistently meeting learner or employer needs
- An action arising from audit, inspection or external review