



**“BOARD GUIDELINES ON VIRTUAL ASSESSMENTS OF SCHOOLS AND COLLEGES”**

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**1 Introduction:**

1.1 Our approach is to trust the professional judgement of Assessors whilst setting out Guidelines for all Awarding Bodies to follow (now published for Schools & Colleges to see on our website). These Guidelines are intended to be **enabling not constraining**. They offer overarching principles to ensure consistency of practice, whilst enabling Awarding Bodies to respond to the challenges of physical distancing required as a result of COVID-19 in their operational areas.

1.2 The Board is committed to ensuring that our Guidelines support rigorous ongoing assessment against the published **national criteria for the Standard**<sup>1</sup>, whilst providing scope for innovative and creative use of digital technology by Awarding Bodies. These Guidelines should be read alongside the **Assessment Guide**<sup>2</sup> – there are no changes to the national criteria.

1.3 **Virtual Assessments**<sup>3</sup> may involve gathering documentary evidence as was the usual practice against all of the **national criteria** - building upon COMPASS<sup>4</sup> results and working towards evidence of the additional impact our assessors require to see on career-related learning outcomes for students arising from the inputs, activities et al.

1.4 Assessors may now supplement this with electronic evidence (e.g. photographs, digital films) of what a school or college has done pre-COVID19, is doing during COVID19 (e.g. virtual online encounters and visits) and had *planned* to do but is prevented by doing because of COVID19. Robust evidence of this would be required to be provided by Careers Leaders via a secure digital meeting platform such as SKYPE/ZOOM/TEAMS or equivalent.

<sup>1</sup> <https://www.qualityincareers.org.uk/2019/09/01/guide-to-the-standard/>

<sup>2</sup> <https://www.qualityincareers.org.uk/2019/09/01/the-assessment-guide/>

<sup>3</sup> By using the term “Virtual” throughout these Guidelines we mean all interactions which are not face to face but are “at a distance”, online or remote including using a secure digital meeting platform such as ZOOM/TEAMS/SKYPE et al

<sup>4</sup> There has been a COMPASS COVID19 update and this updated version will need to be completed if Benchmark activity has been affected by COVID19.

1.5 **Awarding Bodies must give consideration to Safeguarding and the General Data Protection Regulations (GDPR) when using video or audio-only technology to support any part of the Assessment process. Secure technologies must be used.**

1.6 Assessors may also be taking significant testimony from young people either via TEAMS/SKYPE/ZOOM or equivalent, or via Form Stack or Survey Monkey (this should be agreed with the school and college).

1.7 This will lead to the Assessor arriving at a professional judgement that a School or a college is either 'not meeting', 'making good progress' towards meeting, or 'fully meeting' the Standard.

1.8 It is for Awarding Bodies to determine if and how to use various Virtual means to undertake an Assessment of a School or College. The Board is mindful of the pressure Schools and Colleges are going to be under for the foreseeable future and the potential to use virtual assessments to facilitate the Assessment process.

1.9 The Board accepts that a Virtual Assessment is comparable to a face to face Assessment provided the evidence is gathered and evaluated with the rigour required in the **Assessment Guide**<sup>5</sup>. It may well be that, in the 'new normality' post-COVID19, future Assessments may be conducted in a hybrid mix of face to face and Virtual interactions.

1.10 The Board's view is that what matters is not the medium but the rigour and the professional judgements of Assessors in line with the Standard's national criteria.

**2. Flexibility:** The Board believes that Awarding Bodies must have the flexibility to determine if, when and how Virtual interactions take place within the overall Assessment process. Therefore, the Consortium will not be prescriptive. Digital technology offers the opportunity for creativity, not only in terms of the Curriculum and other activities, but also in respect of Awarding Bodies' approaches to Assessment.

**Best practice** would equate to Awarding Bodies having the flexibility to agree with the School or College the best mix of means of supplying evidence. Assessment Reports would benefit from being specific about the use of Virtual interactions to gain key evidence against the national criteria.

### **3. Training & Documentation:**

Evidence from Awarding Bodies which have already begun to use Virtual means to undertake parts of Assessments confirms the importance of ensuring Assessors are confident in using Virtual means – this has implications for the training of Assessors by Awarding Bodies (including, for example, ensuring they are all competent in the techniques required to undertake a Virtual Focus Group of students). The training and guidance for Assessors in making best use of virtual tools is essential for successful, robust Assessments

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<sup>5</sup> <https://www.qualityincareers.org.uk/2019/09/01/the-assessment-guide/>

to take place – there are particular skills in maximising the potential benefits of Virtual meetings.

**Best practice** would equate to Awarding Bodies providing well-documented guidance for Assessors on how to make best use of Virtual interactions in the Assessment process.

**4. Preparation is the key:** Evidence from Awarding Bodies confirms that Assessors will need to review documentary evidence (in a variety of formats) prior to ‘live’ Virtual interactions with students and staff. This should identify the key areas for further discussion and evaluation leading to the required evidence gathering in respect of the national criteria.

**Best practice** would equate to the Assessor preparing, on the basis of evidence gathered thus far, an Agenda in advance of a ZOOM/TEAMS/SKYPE Virtual interaction, including ensuring all participants are aware of what is to be covered in advance of the interaction, and ensuring participants follow the lead of the Assessor.

**5. Safeguarding:** Just as safeguarding is a critical matter to address in person in a school or college, so it is with Virtual interactions. School & College staff will rightly seek to influence how a Virtual interaction takes place from a safeguarding perspective. Awarding Bodies should ensure that schools/colleges provide their Assessors with a copy of their online safeguarding policy so that there can be no doubt that everything has been carried out in accordance with the institution’s own policies.

**Best practice** would equate to Assessors ensuring safeguarding has been discussed with the institution prior to the Virtual interaction and is fully complied with – it might be, in some instances, beneficial if a Teaching Assistant or a senior member of the School or College is involved in the Virtual interaction (perhaps as a non-participant observer, or as a contributor so long as this does not constrain the students giving testimony – Ofsted Inspections in Further Education Colleges, for example, involve a member of the College SLT in Inspections, so in an FEC Assessment this might be an option to consider). Under no circumstances should Virtual interactions with young people be video recorded by anyone outside of the institution.

**6. Gathering evidence from students:** Learner voice is crucial in determining the impact of aspects of a careers education curriculum (e.g. employer interactions, visits to opportunity providers – Virtual or in person). The Standard requires evidence that there are career-related learning outcomes for students, hence gathering evidence directly from students is an essential part of the Assessment process whether face to face, by telephone or by other Virtual means.

**Best practice** would equate to using a number of means to gather evidence – including student questionnaires (such as Form Stack or Survey Monkey) prior to a Virtual interaction such as a Virtual Focus Group in a size which is both manageable by the Assessor and

‘comfortable’ for students involved – so that the interaction is well-planned and successfully implemented.

**7. Gathering evidence from School/College staff and other stakeholders:** Having undertaken preparatory work based upon documentary evidence sources of various forms, the Assessor will have identified key staff to meet with in a Virtual setting and the issues to address. Staff and other stakeholders (e.g. employers) may well be most readily interacted with individually rather than in a group – this is for the School/College and the Assessor to agree. Assessors may find it helpful to agree with the School or College a timetable of those they are to be in touch with Virtually.

**Best practice** would equate to ensuring that staff and stakeholders engaged with are made clear of the purpose of the interaction, in advance, and the issues to be addressed – a preliminary completion of a ‘witness testimony’ would ensure the Virtual interaction is ‘to the point’.

**8. Making best use of ‘impact assessments’<sup>6</sup>:** Some Careers Leaders have already begun undertaking impact assessments on their provision as a result of the prevailing context in which we all now operate and looking towards the ‘new normality’. These would provide a rich source of evidence in Assessments.

**Best practice** would equate to agreeing with a School or College how such an impact assessment is considered within the framework of the Assessment including confirming what had been planned prior to COVID19, what remedial action has been taken or is planned to ‘replace’ activity where required, alongside seeking evidence that students’ career-related learning has continued to be advanced.

**9. Consistency:** Just as Awarding Bodies are required by their Licence to ensure that consistency is maintained in the approaches of their Assessors in reaching crucial judgements against the national criteria, the Consortium would require the same of Awarding Bodies through annual Continuing Quality Improvement Reviews and at Relicensing Panels to provide evidence in respect of Virtual interactions and their outcomes.

**Best practice** would equate to Awarding Bodies providing such evidence to the Consortium as part of the CQIRs and at Panels.

**10. Extending Accreditation Periods:** Where a School or a College is ‘working towards’ the Standard, but its progress is delayed due to COVID19, Awarding Bodies should have the flexibility to extend the timeframe of the ‘working towards’ phase to maintain a supportive approach to the School or College ‘working towards’ the Standard. Where a School or College has previously met the Standard and is working towards reaccreditation, Awarding

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<sup>6</sup> *The Board’s Professional Team and the Executive Director will be drafting a potential draft ‘impact assessment proforma’ which might be offered to Assessors to use to make judgements against the national criteria in the light of the impact of COVID19.*

Bodies should have the flexibility to extend the life of the current accreditation in the on-going pandemic and its aftermath.

**Best practice** would equate to Awarding Bodies using their professional discretion in considering such a request from a School or College – and, in the light of the evidence presented for such an extension, the Consortium has agreed to grant the Awarding Body the right to agree an extension of up to two academic terms.

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### APPENDIX: Some Suggested Supporting Documents

- 1) **The Quality in Careers Consortium:** Assessment Guide for Licenced Awarding Bodies and Assessors: <https://www.qualityincareers.org.uk/2019/09/01/the-assessment-guide/>
- 2) **The Quality in Careers Consortium:** The Guide to the Standard <https://www.qualityincareers.org.uk/2019/09/01/guide-to-the-standard/>
- 3) **The Career Development Institute:** Position Paper on Safe and Ethical Use of Web Video-conferencing for Personal Guidance  
[https://www.thecdi.net/write/CDI-Position-Paper\\_on\\_safe\\_and\\_ethical\\_virtual\\_meetings.pdf](https://www.thecdi.net/write/CDI-Position-Paper_on_safe_and_ethical_virtual_meetings.pdf)
- 4) **The Career Development Institute:** Careers Leaders Community of Practice: virtual careers resources: <https://www.careersleaders.thecdi.net/>
- 5) **The Careers & Enterprise Company:** Guidance on scoring online employer engagement in Compass: designed to support Careers Leaders with the development of careers programmes for young people and advise on how to complete the Compass tool while face-face contact is not possible due to Covid-19. It focuses on measuring online employer engagement in relation to Gatsby Benchmarks 5 and 6. Full guidance for all Gatsby Benchmarks will be made available in the autumn.  
[https://www.careersandenterprise.co.uk/sites/default/files/1361\\_online\\_engagement\\_guidance\\_option\\_2\\_v6\\_.pdf](https://www.careersandenterprise.co.uk/sites/default/files/1361_online_engagement_guidance_option_2_v6_.pdf)
- 6) **The Careers & Enterprise Company and the Department for Education:** A collation of online resources to support virtual delivery of careers programmes: <https://www.careersandenterprise.co.uk/covid-19-resources>  
<https://www.gov.uk/government/publications/covid-19-safeguarding-in-schools-colleges-and-other-providers/coronavirus-covid-19-safeguarding-in-schools-colleges-and-other-providers>
- 7) **In respect of conducting online focus groups:** Lobe., B., Morgan, D., & Hoffman, K. (2020). Qualitative Data Collection in an Era of Social Distancing. International Journal of Qualitative Methods (publication forthcoming).
- 8) **Tips for collecting primary data in a COVID19 era**  
<https://www.odi.org/publications/16977-primary-data-collection-covid-19-era>

[https://www.odi.org/sites/odi.org.uk/files/resource-documents/primary\\_data\\_collection\\_emerging\\_analysis\\_and\\_ideas\\_1.pdf](https://www.odi.org/sites/odi.org.uk/files/resource-documents/primary_data_collection_emerging_analysis_and_ideas_1.pdf)

9) **With thanks to Jacqui Phipps, Suffolk County Council and “The East Careers Training”** we reproduce below their June 2020 “Safeguarding Guidance for Remote Interactions with Young People” as it is not accessible on a website.

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### **Safeguarding Guidance for Remote Interactions with Young People**

**During this period of uncertainty, it’s essential that we continue to maintain contact with young people to support them during important transition periods such progression to Post 16 or Post 18 learning, training or employment. However, this work will take different forms that require additional thought to ensure that both young people and practitioners are appropriately safeguarded.**

Any of your current organisation’s safeguarding procedures need to be adhered to – such as ensuring any practitioners conducting one -to one interactions are DBS checked, have undertaken safeguarding training and adhere to statutory safeguarding guidance. All practitioners should make themselves aware of the who the Designated Safeguarding Lead (DSL) is in their organisation, how to contact them and how to make safeguarding referrals during this time.

#### **Practitioners and management should discuss and agree:**

- All aspects of planning for and scheduling of one-to-one virtual sessions.
- Methods of delivery that enable all young people to take part regardless of access to technology, disability and environment.
- An appropriate process in the event of a crisis arising during an online one-to-one session.
- Procedures to notify students of their appointment in advance including how to access the technology.
- Methods of informing parents of the remote support available and how this will work – this could also include signposting links to other trustworthy organisations.

[NSPCC example-consent-form](#)

#### **Remote delivery can include:**

##### **Real time methods e.g.**

Video (Skype, Zoom, WhatsApp, Microsoft Teams. Google Hangouts etc)

Telephone, Instant chat

**Delayed response:** E-mail, letter. Text

**Contracting**

Practitioners should ensure that the contracting part of the interaction takes place – even where the adviser has previously engaged with the young people – and that this is clear and understood. This should include the core areas such as Safeguarding, GDPR – as well as time of the interview and the ethics of a good interaction e.g. explore all options, the ability for the young person to leave if they wish, be honest, ask questions.

**Good practice for virtual meetings**

**Disclosure: students sometimes disclose information and emotion very quickly online. Practitioners need to understand the dynamics underpinning this kind of response so that they can work effectively with students who exhibit this.**

**Risk Assessment: practitioners should assess each situation before the session and also pro-actively during the session to assess the risk to themselves and the young person and take action or change their approach accordingly.**

- Most meetings should be held within an agreed timeframe (e.g. normal school times) and not exceed the normal duration of a face to face interaction (e.g. 45 minutes) except in exceptional circumstances
- A record of each meeting should be kept. This should include the method of delivery and summary of the discussion and any actions that were agreed. All records must be kept secure in line with usual GDPR requirements.
- Where possible try to avoid 1:1 situations - a parent, teacher or other responsible adult can be invited to the meeting and drop in from time to time with the agreement of the young person.
- Make sure the platform you are using is suitable for their age group, agreed by school or college management. Also check the privacy settings so that it is secure as possible from outside hacking.
- All practitioners and young people must wear suitable clothing, including anyone else in the household.
- Any devices used should be in appropriate areas, for example, not in bedrooms. Consider the background that the young person will see on video.
- Language must be professional and appropriate, including that of any family members in the room.
- Webinars and live broadcast should be recorded where possible to maintain a record of the activity. You will need to store this in line with GDPR requirements.

**CPD**

Practitioners should be honest about their skills and knowledge regarding conducting remote interactions. This should include their ability to use technology effectively and an awareness of how electronic data and information are stored, along with the ethical and legal requirements of service delivery. They should ask line managers for advice and support if they are not confident in these areas.

**References and other sources of information**

The Department for Education have released the following safeguarding guidance for schools and colleges during the Covid-19 situation. It is useful for providers to be aware of the content and use to contextualise alternative services:

<https://www.gov.uk/government/publications/covid-19-safeguarding-in-schools-colleges-and-other-providers/coronavirus-covid-19-safeguarding-in-schools-colleges-and-other-providers>

The Careers and Enterprise Company– Guidelines for Providers (April 2020)

NCGE Ireland - Good Practice for 'Virtual' one-to-one sessions (April 2020)