



Skills Funding  
Agency

# National Careers Service Area-based contracts business rules

Version 3

April 2016

Of interest to area-based prime contractors (prime contractors).

Version	Issued	Summary of changes
1.0	October 2014	
1.3	April 2015	
2.0	September 2015	
3.0	March 2016	<p><b>Throughout document</b></p> <ul style="list-style-type: none"> <li>• All reference to the European Social Fund (including logos) removed.</li> <li>• Various small amendments to comply with GOV.UK and SFA plain English guidance.</li> </ul> <p><b>Introduction</b></p> <p>The business rules set out the requirements prime contractors are contractually obliged to meet. They ensure that all customers benefit from a high-quality, consistent and efficient service. Prime contractors will need to ensure that the terms of any subcontract refer to the requirement to comply with these business rules. The full set of requirements are set out in the following suite of contractual documents:</p> <p>Bulleted list - removal of 'Implementation plan' and following additions:</p> <ul style="list-style-type: none"> <li>• Inspiration plan(s)</li> <li>• Customer Data Service Code of Connection (CoCo)</li> </ul> <p>Secretary of State for Business, Innovation and Skills, acting through the SFA, reserves the right to update the business rules. We will communicate any updates to prime contractors.</p> <p>1.1 The National Careers Service offer is available to all adults and young people living or working in England. Please refer to the glossary for definitions of 'adult' and 'young people'. The offer includes information and advice about learning and career management including apprenticeships and traineeships. Customers will access the service through the following delivery routes.</p>

		<p><b>Area-based service</b></p> <ul style="list-style-type: none"> <li>• Face-to-face and telephone advice service for adults.</li> <li>• Face-to-face and telephone information service for adults.</li> <li>• Email information and advice for adults.</li> <li>• Digital services including: <ul style="list-style-type: none"> <li>○ local pages on the National Careers Service website</li> <li>○ local social media activity</li> <li>○ email information and advice for adults</li> </ul> </li> </ul> <p>5.1 Prime contractors must ensure that customers are directed to the most appropriate prime contractor, so that customers receive a consistent service. The application of the rules below may result in a warm or cold customer transfer to another prime contractor. Please refer to section six of this document for the definition of warm and cold transfers.</p> <p>5.4 Young people who need information (rather than advice) must be directed to the National Contact Centre, the National Careers Service website and to their school or college.</p> <p>7.1 Prime contractors must collect and store data about their customers. This is needed</p> <ul style="list-style-type: none"> <li>• to evidence claims and to meet audit requirements as set out in the funding rules</li> <li>• to underpin integrated customer journeys as specified in the Customer Data Service Code of Connection</li> <li>• to provide the specified management information data to the SFA as specified in the National Careers Service Data Collections Service guidance and associated specifications</li> </ul> <p>7.2 Prime contractors must ensure the identity of a customer is verified beyond reasonable doubt before creating a customer record on their system. You can find further details on verification of an individual within GPG45. (CESG - Good Practice Guide No. 45 - Identity proofing and verification of an individual V2.4 Oct 2015.)</p>
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		<p>7.3 Prime contractors must ensure they have authenticated an existing customer returning to the service before they release any information held on the customer. This may be achieved through challenge/response questions like shared secrets. The SFA has released a short guide on this process and you can access it from the National Careers Service team site.</p> <p>7.4 Customers have the right to request that their records are removed from contractor and SFA systems. This is known as a Termination of Service request and will also result in the removal of an LLA so this must be made clear to a customer. If the customer subsequently re-contacts the service they will be treated as new customer.</p> <p>7.5 Prime contractors must use their own customer relationship management system to supply data to the SFA.</p> <p>7.6 You can find further information on evidence needed for funding in the funding rules.</p> <p>7.7 You can find further information about the management information needed in the management information reporting specification.</p> <p>8.3 If a customer is unable to access their skills action plan through their LLA then they must be sent an encrypted and password protected version.</p> <p>9.2 All eligible customers must be encouraged to open and use their LLA to help manage their careers and progression. They should be instructed to review their skills action plan and update it so that their adviser can track progress against the agreed actions. If a customer is unable to access their skills action plan through their LLA then they must be sent an encrypted and password protected version.</p> <p>9.3 Prime contractors must ensure that customers are aware that personal information will be stored within their LLA, for example, CV Information along with their agreed skills action plan. If a customer is unable to access their skills action plan through their LLA, then they must be</p>
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		<p>sent an encrypted and password-protected version.</p> <p>9.5 Customers that have received advice should be encouraged to review their skills action plan in their LLA and to confirm whether they are satisfied with the service they have received.</p> <p>11.1 Prime contractors must broker local relationships to provide inspiring and motivating work-related experiences for customers. These local relationships will be between schools, employers and further education and higher education institutions and other intermediary organisations.</p> <p>11.3 Prime contractors must identify examples of Inspiration activity and share case studies with the SFA. A minimum of one case study must be submitted monthly on the ninth working day to <a href="mailto:nationalcareersreturns@sfa.bis.gov.uk">nationalcareersreturns@sfa.bis.gov.uk</a> . Case studies must include examples of good practice and demonstrate the impact of the activity.</p> <p>12.2 Prime contractors must work with LEPs to develop rich and relevant labour market information (LMI). This must be used to populate their local pages on the National Careers Service website.</p> <p><b>13.3 deleted bullet 5</b></p> <ul style="list-style-type: none"> <li>• <b>A maximum of 11 pages per area based prime contractor. This will be reviewed by the end of 2014 with a view to increasing the volume of content.</b></li> </ul> <p>14.2 Prime contractors must produce an annual marketing strategy for the service, reflective of local needs and the national marketing strategy.</p> <p><b>Deleted</b></p> <p><b>25 Prime contractors submit robust and timely management information</b></p>
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		<p><b>25.1 Core management information must be submitted as agreed with the Skills Funding Agency in the MI reporting requirements located on the teamsite. The performance data template must be returned by the fifth working day of each month to <a href="mailto:nationalcareersreturns@sfa.bis.gov.uk">nationalcareersreturns@sfa.bis.gov.uk</a></b></p> <p><b>25.2 Invoices with the relevant purchase order number must be sent to the Skills Funding Agency accounts team by the fifth working day of each month to <a href="mailto:accountingservices-sfa@sfa.bis.gov.uk">accountingservices-sfa@sfa.bis.gov.uk</a></b></p> <p><b>25.3 Prime contractors must supply additional, ad hoc management information as requested by the Skills Funding Agency.</b></p> <p>25 Prime contractors must submit robust and timely management information</p> <p>25.1 The National Careers Service Data Collection Service will be the primary source of management information (MI) data. However, certain MI will be returned manually using SFA defined templates.</p> <p>25.2 Prime contractors are expected to submit a monthly data return through the Hub by the eighth working day of each month, as outlined in the prime contractor National Careers Service data collections guidance and associated specifications. These are all located in the data collections service area of the National Careers Service team site.</p> <p>25.3 Where data collection and management information is submitted manually, using SFA-defined templates located on the team site, these must be returned no later than by the eighth working day of each month by email to <a href="mailto:nationalcareersreturns@sfa.bis.gov.uk">nationalcareersreturns@sfa.bis.gov.uk</a>.</p>
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		<p><b>Deleted</b></p> <p><b>26.1 The performance management approach will monitor how well prime contractors perform against agreed profiles. Where performance slips above or below the following tolerance levels</b></p> <ul style="list-style-type: none"> <li>• plus or minus 7% at quarter one</li> <li>• plus or minus 5% at quarter two</li> <li>• plus or minus 3% at quarter three</li> <li>• zero tolerance at year end</li> </ul> <p><b>performance management interventions may be initiated.</b></p> <p>26.2 As a minimum, performance management will be informed by:</p> <ul style="list-style-type: none"> <li>• monthly, quarterly and annual <a href="#">performance monitoring</a> against agreed financial profiles and agreed national targets.</li> <li>• regular performance assessments against contribution to whole- service KPIs</li> <li>• financial health, management and control mechanisms</li> <li>• Ofsted inspection outcomes</li> <li>• achievement and retention of matrix accreditation</li> <li>• policy compliance and partnership activity</li> <li>• performance against service level agreements</li> <li>• data quality and security requirements</li> </ul> <p><b>30 Deleted</b></p> <p><b>It is possible that other sensitive matters will be identified during the development and support of the service. When such matters are identified, the Supplier must advise the customer.</b></p> <p>32.1 Prime contractor and customer technical support is currently provided by a third party supplier by the freephone 0800 100 900. Technical support relating to the CDS is provided by CoCo.</p>
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**Appendix B - Glossary**

Customer	An individual seeking service from the National Careers Service who receives a skills action plan.
Customer record	The mandatory data that must be kept within the prime contractor systems to evidence payment and audit requirements; to supply management information and to underpin customer journeys.
External organisations	Funding bodies, other providers and other organisations with which prime contractors interact for the benefit of customers and other users of the National Careers Service.



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## Introduction

This document sets out the business rules for the area-based contracts for the National Careers Service which will apply from 1 October 2014. The rules form part of the terms and conditions of the contracts between the Secretary of State for Business, Innovation and Skills acting through the Skills Funding Agency (SFA) and all area-based prime contractors (prime contractors) of the National Careers Service who receive funding from the SFA.

The business rules ensure that all customers benefit from a high-quality, consistent and efficient service.

The business rules set out the requirements prime contractors are contractually obliged to meet. They ensure that all customers benefit from a high-quality, consistent and efficient service. Prime contractors will need to ensure that the terms of any subcontract refer to the requirement to comply with these business rules. The full set of requirements are set out in the following suite of contractual documents:

- Terms and conditions
- Schedules
- Funding rules
- Business rules
- Invitation to tender (ITT)
- Prime contractor response to tender
- Inspiration plan(s)
- Customer Data Service Code of Connection (CoCo)

Secretary of State for Business, Innovation and Skills, acting through the SFA, reserves the right to update the business rules. We will communicate any updates to prime contractors.

## **National careers service offer**

### **1 Customers receive impartial careers information, advice and guidance**

1.1 The National Careers Service offer is available to all adults and young people living or working in England. Please refer to the glossary for definitions of 'adult' and 'young people'. The offer includes information and advice about learning and career management including apprenticeships and traineeships. Customers will access the service through the following delivery routes.

#### **Area-based service**

- Face-to-face and telephone advice service for adults.
- Face-to-face and telephone information service for adults.
- Email information and advice for adults.
- Digital services including:
  - local pages on the National Careers Service website
  - local social media activity
  - email information and advice for adults
- Specialist service for adults in custody aged 18 years or over and ex offenders (please see the Working with offenders section of this document for further details).

Please refer to the Customer Journey and Social Media sections for further details.

#### **National Contact Centre**

- Telephone information services for adults.
- Telephone information and advice services for young people.
- Telephone triage services for adults.
- Digital services for adults and young people including information and advice sent by email, webform, webchat and prochat.
- Social media services for both young people and adults including listening and advice through social media channels.
- Feedback and complaint-handling for all customers.

First-line customer and prime contractor technical support, will be delivered by the National Contact Centre for all customers.

Please see the Customer journey section of this document for more details.

## **National Careers Service digital service**

- National Careers Service website including careers tools and information such as the Skills Health Check, CV Builder and Course Directory.
- Lifelong Learning Account (LLA) to store career-related information and to access and update their adviser-mediated action plan.
- Delivery of webchat, prochat, webform and national email services.
- Local and national careers content.
- National social media activity.

1.2 Feedback from customers will be used to inform improvement to the service. Prime contractors will be expected to support these improvements.

1.3 The National Contact Centre opening hours are 8.00am to 10.00pm, seven days a week. Statutory holiday closures are Christmas Day, Boxing Day and New Year's Day. Prime contractors must provide details of the opening hours for their telephone service and face-to-face core service to the SFA and the National Contact Centre contractors.

## **2 The service offer is tailored to meet individual needs**

2.1 Prime contractors must take account of individual customer circumstances including any barriers that the customer may have to work or learning.

2.2 Prime contractors must ensure customers are aware of how and when they can access the service. Where required, prime contractors must facilitate access to alternative routes; this may include referral to another prime contractor.

2.3 The service offer must reflect the Customer Charter. You can access the Customer Charter through the National Careers Service team site.

## **3 The service offer is accessible to all customers**

3.1 Prime contractors must ensure and be able to demonstrate that the service is accessible to all customers and meets all equality and diversity requirements.

3.2 Customers in priority groups must receive additional careers guidance and support if needed. This is particularly important for those who are furthest from learning and work.

3.3 All adult customers in priority groups must be offered access to a local, face-to-face service.

3.4 Prime contractors must support the following priority groups as outlined in the funding rules:

- Low-skilled adults without a Level 3 qualification.
- Young adults aged 18 to 24 not in education, employment or training.
- Adults facing redundancy, newly redundant or distant from the labour market (that is, the customer has not been in any type of work for two years or more).
- Jobcentre Plus customers who are at least 18 years old.
- Adults in custody aged 18 years or over, or an ex offender.
- Adults with learning difficulties and/or disabilities.

3.5 Prime contractors must be able to demonstrate how they provide additional support for the priority groups listed. This should include the levels of support and number of interactions for each group.

#### **4 The service offer is digital by default**

- 4.1 All customers must be encouraged to access and use the National Careers Service digital offer in line with the [Government Digital Strategy](#).
- 4.2 Prime contractors must deliver the service in line with the government's [digital by default service standard](#) and the published [government digital strategy](#).
- 4.3 Prime contractors must comply with the SFA's browser policy. The [browser policy](#) is available through the National Careers Service team site.
- 4.4 Prime contractors must promote the digital offer and ensure that customers are fully aware of the resources, tools and services available. Prime contractors are responsible for ensuring they are aware of, and understand, the latest digital offer, including specific careers tools.
- 4.5 If customers are able to access digital services independently, they must be encouraged to do so in order to support independent career management.
- 4.6 If customers are unable to access digital services independently, they must be given support to enable them to do so at the point of query and to enable independent career management going forwards.
- 4.7 Prime contractors are encouraged to make use of technology to deliver the service to customers. Prime contractors must provide the SFA with details of any digital services which they will use to deliver the service. Prime contractors planning to introduce a new digital technology must first obtain written agreement from the SFA.

## Customer journey

### 5 Customers are directed to the correct prime contractor

- 5.1 Prime contractors must ensure that customers are directed to the most appropriate prime contractor, so that customers receive a consistent service. The application of the rules below may result in a warm or cold customer transfer to another prime contractor. Please refer to section six of this document for the definition of warm and cold transfers.
- 5.2 Young people, as defined in the glossary, who need careers information and advice must be directed to one or more of the following:
- The young persons' contact centre.
  - Their school or college.
  - The National Careers Service website (web chat can be accessed through the website).

The only exceptions to this rule will be Jobcentre Plus claimants who are 18 years old and 18 year olds in custody; prime contractors will provide advice in this instance. For these customers the National Contact Centre will use a warm transfer unless the prime contractor is closed, in which case a cold transfer can take place.

- 5.3 Adults, as defined in the glossary, who need advice (rather than information) will be directed by the National Contact Centre to their local prime contractor. This rule also applies to Jobcentre Plus claimants who are 18 years old and 18 year olds in custody. The only exception to this rule will be adults who choose to receive advice through webchat, prochat, webform or national email; the adult contact centre will provide advice in this instance. A warm transfer will be used unless the prime contractor is closed, in which case a cold transfer will take place.
- 5.4 Young people who need information (rather than advice) must be directed to the National Contact Centre, the National Careers Service website and to their school or college.
- 5.5 Adults who need information (rather than advice) must be directed to the National Contact Centre and the National Careers Service website. To ensure a good customer experience, it may be necessary to provide information at the initial point of contact and direct the customer to these routes.
- 5.6 Adults who wish to book a face-to-face appointment will be directed to their local prime contractor by the National Contact Centre. A warm transfer will be used unless the prime contractor is closed (or the customer makes a request through the digital service) in which case a cold transfer will take place.

## **6 Customers move easily between different prime contractors**

- 6.1 Prime contractors must provide the required warm or cold transfer to transfer a customer to another prime contractor. We set out the definitions below. Customers accessing the telephone service will be transferred seamlessly between the National Contact Centre and the relevant prime contractor.

### **Warm transfer**

A warm transfer takes place when a customer is transferred in real time from one prime contractor to another. It will only be possible to use a warm transfer if both prime contractors are open for business. For example, the National Contact Centre introduce a caller directly to the relevant prime contractor.

### **Cold transfer**

A cold transfer takes place when a customer cannot be transferred in real time from one prime contractor to another, for example, when the relevant prime contractor is closed.

- 6.2 The National Contact Centre will provide a triage service for all customers contacting the National Careers Service national number. The triage service will establish the customer's needs and provide a resolution (for example, provide information or provide advice to young people) or transfer the customer to the relevant prime contractor in line with the rules set out in the Customer journey section.

## **7 Customers have a customer record**

- 7.1 Prime contractors must collect and store data about their customers. This is needed
- to evidence claims and to meet audit requirements as set out in the funding rules
  - to underpin integrated customer journeys as specified in the Customer Data Service Code of Connection
  - to provide the specified management information data to the SFA as specified in the National Careers Service Data Collections Service guidance and associated specifications
- 7.2 Prime contractors must ensure the identity of a customer is verified beyond reasonable doubt before creating a customer record on their system. You can find further details on verification of an individual within GPG45. (CESG - Good Practice Guide No. 45 - Identity proofing and verification of an individual V2.4 Oct 2015.)

- 7.3 Prime contractors must ensure they have authenticated an existing customer returning to the service **before** they release any information held on the customer. This may be achieved through challenge/response questions like shared secrets. The SFA has released [a short guide](#) on this process and you can access it from the National Careers Service team site.
- 7.4 Customers have the right to request that their records are removed from contractor and SFA systems. This is known as a Termination of Service request and will also result in the removal of an LLA so this must be made clear to a customer. If the customer subsequently re-contacts the service they will be treated as new customer.
- 7.5 Prime contractors must use their own customer relationship management system to supply data to the SFA.
- 7.6 You can find further information on evidence needed for funding in the funding rules.
- 7.7 You can find further information about the management information needed in the management information reporting specification.

## **8 Customers accessing advice services receive a skills action plan**

- 8.1 Prime contractors must produce a skills action plan for all customers who receive advice. The skills action plan will be used to record career management activities and will provide the evidence to support funding claims as set out in the funding rules.
- 8.2 Skills action plans form an integral part of the advice process. They must provide a record of customer interactions and an opportunity for customers to reflect on their skills and record plans for future development. The skills action plan supports the achievement of learning and work goals.
- 8.3 If a customer is unable to access their skills action plan through their LLA then they must be sent an encrypted and password protected version.
- 8.4 Passwords for encryption purposes must be at least 15 characters long and contain a lower and upper case letter, a number and a special character. They must be communicated to the recipient by a mechanism that is different to the transfer method, for example verbally or by SMS message.

## **9 Customers are encouraged to manage their career journey through a Lifelong Learning Account (LLA)**

- 9.1 Prime contractors must promote the tools available on the National Careers Service website including the LLA and Personal Learning Record.



- 9.2 All eligible customers must be encouraged to open and use their LLA to help manage their careers and progression. They should be instructed to review their skills action plan and update it so that their adviser can track progress against the agreed actions. If a customer is unable to access their skills action plan through their LLA then they must be sent an encrypted and password protected version.
- 9.3 Prime contractors must ensure that customers are aware that personal information will be stored within their LLA, for example, CV Information along with their agreed skills action plan. If a customer is unable to access their skills action plan through their LLA, then they must be sent an encrypted and password-protected version.
- 9.4 If a customer does not have access to a computer or the internet they must be advised how they can access these resources in order to use their account.
- 9.5 Customers that have received advice should be encouraged to review their skills action plan in their LLA and to confirm whether they are satisfied with the service they have received.

## **Inspiration and brokerage**

### **10 Prime contractors develop strong relationships with national, regional and local stakeholders**

- 10.1 Prime contractors must build strong relationships with national, regional and local stakeholders to extend the benefits of the service to more customers.
- 10.2 Prime contractors must submit a monthly report on the ninth working day detailing activity undertaken in line with the Inspiration implementation plan as detailed in the contract. You must submit these to [nationalcareersreturns@sfa.bis.gov.uk](mailto:nationalcareersreturns@sfa.bis.gov.uk). Please refer to the funding rules for details of the evidence requirements.
- 10.3 The National Careers Service will work with national stakeholders. Prime contractors will support this by building strong relationships with national stakeholders at regional and local levels.
- 10.4 Prime contractors must work with a range of stakeholders to increase:
  - the number of customers using the National Careers Service as a result of referrals from partner organisations
  - the proportion of the public who are aware of the National Careers Service
  - awareness among stakeholders of the National Careers Service
  - the quality of the service

## **11 Prime contractors broker relationships to provide inspiring experiences for customers**

- 11.1 Prime contractors must broker local relationships to provide inspiring and motivating work-related experiences for customers. These local relationships will be between schools, employers and further education and higher education institutions and other intermediary organisations.
- 11.2 Prime contractors must demonstrate that their Inspiration activities add value over and above existing activity in this area. We set out the evidence requirements in the funding rules.
- 11.3 Prime contractors must identify examples of Inspiration activity and share case studies with the SFA. A minimum of one case study must be submitted monthly on the ninth working day to [nationalcareersreturns@sfa.bis.gov.uk](mailto:nationalcareersreturns@sfa.bis.gov.uk). Case studies must include examples of good practice and demonstrate the impact of the activity.
- 11.4 Prime contractors **are not** expected to provide careers advice or careers education in schools as part of their Inspiration activity. This is not part of the National Careers Service offer.
- 11.5 Prime contractors must share with the National Contact Centre details of any brokerage organisations they are working with.

## **12 Prime contractors tailor their delivery to support local priorities and localism**

- 12.1 Prime contractors must develop strong relationships with local enterprise partnerships (LEPs) and work with them to agree local key performance indicators (KPIs) which are relevant and measurable locally. Prime contractors must share data assessed against the KPIs with LEPs.
- 12.2 Prime contractors must work with LEPs to develop rich and relevant labour market information (LMI), which is informative and tailored to the local labour market. This must be used to populate their local pages on the National Careers Service website.

## **Local digital content**

### **13 Prime contractors provide local digital content**

- 13.1 The SFA will continue to develop the National Careers Service digital offer. Content from prime contractors will offer a richer and more local experience for online users, by taking the approach outlined below.

13.2 Each prime contractor must prepare up to 11 content pages which should cover the following:

- One landing page that details high-level information and provides access to a further 10 (maximum) content pages.
- Comprehensive local LMI that is aligned to information already on the National Careers Service website. This should include announcements either made, or about to be made, on firms taking on staff or short-to-medium-term developments that will lead to job opportunities.
- Local service delivery details and outlets.
- Local events, campaigns and initiatives.
- Local strategies and priorities published by various local strategic authorities.
- Local options to experience first-hand careers through opportunities that will motivate and inspire them to make better decisions about their future plans.
- A local resource area with details of:
  - local employers and organisations who are willing to engage with, and support, schools and colleges to provide work experience, contributions about work and careers to support the curriculum, speakers to inspire and motivate
  - locally-developed resources that support teachers and lecturers to create motivating activities for pupils and students
  - case studies showing young people and adults who are motivated and inspired to realise their goals

13.3 Prime contractors must follow the current content guidelines and develop content in line with current SFA [browser policies](#).

- Content must be accurate, up to date and reflect all customer needs and the prime contractor's geographical area.
- Local LMI is produced in consultation with key local partners and is aligned to LMI information already on the National Careers Service website.
- Content must be reviewed and updated at least once a month.
- Content must be implemented in line with the structure of the website and have a clear sub-navigation that has been agreed with the SFA.
- Standard page templates are used.
- All content (text, videos, images, infographics, links, documents, and so on) adheres to SFA [policies and guidelines such as](#):
  - brand guidelines
  - accessibility and usability guidelines
  - style guide
  - plain English

- Any content loaded onto the website must not adversely affect the performance of the site and the page load times.
  - Meets the matrix standard.
  - Content must complement and not contradict policy or any other information on the website.
  - National contact routes must be promoted as the first point of contact for customers needing careers information and advice.
  - Content links to other relevant content on the website must be included to promote customer journeys, such as job profiles, tools and regional LMI. The SFA content team will support this activity.
  - The SFA has the final say on all content published on the website.
- 13.4 Content which is relevant to prime contractors (service delivery) should not be added to the website but should be sent to the SFA through [citizendigital@sfa.bis.gov.uk](mailto:citizendigital@sfa.bis.gov.uk) so that we can add it to the National Careers Service website.
- 13.5 The content on the website is the responsibility of the SFA. The SFA content management team, together with your Consumer Services delivery manager, will ensure the content is fit for purpose.
- 13.6 The process for managing local digital content is as follows:
- Prime contractors will have editorial control and ownership of the content from their geographical area. As these pages form part of the wider website, the SFA content team will undertake quality assurance checks on the pages.
  - A prime contractor may have one content editor and up to five content creators. Prime contractors must have the capability to create, edit and publish content during core service hours.
  - Prime contractors can contact the SFA content team by emailing [citizendigital@sfa.bis.gov.uk](mailto:citizendigital@sfa.bis.gov.uk).
  - Feedback from customers on the local digital pages will be handled through the existing process. The SFA content team will feedback queries to prime contractors.
  - Prime contractors will need to have arrangements in place to answer customer enquires and resolve issues.

## **Marketing, branding and PR**

### **14 Prime contractors support the National Careers Service marketing strategy**

- 14.1 Prime contractors must support the national marketing strategy. You can access the marketing strategy through the National Careers Service team site.

- 14.2 Prime contractors must produce an annual marketing strategy for the service, reflective of local needs and the national marketing strategy.
- 14.3 As part of the local strategy, prime contractors can design and produce local materials which must adhere to the National Careers Service brand guidelines. You can download all National Careers Service logos, brand, guidelines, collateral and templates. For further details please register on the [SFA brand site](#). Please use the following email address [marcomms@sfa.gov.uk](mailto:marcomms@sfa.gov.uk) as the sponsor when you register.
- 14.4 Prime contractors must nominate a marketing and communications lead who will act as a direct contact for the National Careers Service marketing and communications team. We expect leads to attend regular meetings and contribute to joint working activities such as supporting national campaigns.
- 14.5 Prime contractors must act as ambassadors and advocates for the service, particularly in relation to their local partnership activity.

## **15 The service is promoted and marketed in line with the National Careers Service brand guidelines**

- 15.1 Prime contractors must promote the service in line with the National Careers Service brand guidelines and any other related brand values and guidelines (for example, the European Social Fund).
- 15.2 All marketing and promotional materials must comply with the brand guidelines and must be approved by the SFA marketing and communications team. Please allow five days for approval. You should submit any draft materials and any branding-related queries by email to [marcomms@sfa.bis.gov.uk](mailto:marcomms@sfa.bis.gov.uk).
- 15.3 All marketing and promotional materials must include the National Careers Service website address and national number. They must not include a local website address or telephone numbers.
- 15.4 Prime contractors must promote the National Careers Service brand and must ensure that high-profile National Careers Service branding is deployed at every delivery location.
- 15.5 Prime contractors must immediately remove or amend any promotional, marketing or communication material that the SFA deems to be detrimental to the National Careers Service (or SFA) brand or reputation. You must report any instances of brand misuse by third parties by email to [marcomms@sfa.bis.gov.uk](mailto:marcomms@sfa.bis.gov.uk).
- 15.6 You can access further resources, including collateral, through the [SFA brand site](#).

## **16 Prime contractors support local, regional and national events, campaigns and marketing activity**

- 16.1 Prime contractors must be proactive in engaging with major local and regional events that provide opportunities to reach customers, employers, schools and stakeholders. Prime contractors must attend and provide adviser support for key local, regional and national events such as National Careers Guidance Shows, The Career Development Organisation (CRAC), The Skills Show, The Skills Show Experience and the Big Bang (and others as requested by the SFA).
- 16.2 Prime contractors must support and engage with specific marketing and PR campaigns as directed by the SFA.
- 16.3 Prime contractors must support campaign activity and ensure they have additional resource available to support anticipated increases in demand as notified by the SFA.
- 16.4 Prime contractors must support the evaluation of campaigns and other national marketing and PR activity (including the provision of evaluation and response data) either monthly or as requested by the SFA.
- 16.5 Prime contractors must ensure they have staff who are willing to undergo media training and participate in media activity, including radio and press interviews.
- 16.6 Prime contractors must also support media activity by providing written material such as CV and interview tips and quotes for regional media outlets, as requested by the SFA.
- 16.7 Prime contractors must actively pursue a local PR and media strategy and ensure that local PR and media activity supports national activity.
- 16.8 Prime contractors must always refer to themselves as the National Careers Service when engaging in local PR and media activity.

## **17 Case studies are produced to support key marketing and PR messages**

- 17.1 Prime contractors must produce and submit a minimum of one, maximum of two high-quality case studies each month using the SFA [PR template](#) and email them to: [pressofficeteam@sfa.bis.gov.uk](mailto:pressofficeteam@sfa.bis.gov.uk).
- 17.2 Prime contractors must also support ad hoc requests for case studies in relation to specific PR or media campaigns.

## Social media

### 18 The National Careers Service is promoted and accessible through social media

- 18.1 Prime contractors must support and amplify current National Careers Service social media activity. This includes the National Careers Service presence on Twitter, Facebook and YouTube and contributing to the growing online service offer.
- 18.2 Prime contractors may produce their own National Careers Service-branded Facebook page, Twitter page or other, similar social media pages.
- 18.3 Prime contractors must not use 'National Careers Service' in their Twitter @handle, as doing so could represent your account as the official National Careers Service account with potential users online.
- 18.4 **Under no circumstances should the acronym NCS be used to denote the term 'the National Careers Service'**. This may be confused with the National Citizen Service who use #ncs in social media campaigns.
- 18.5 You should provide evidence of social media activity in regular reporting to show the impact of activity and engagement rates.

## Quality and customer satisfaction

### 19 Prime contractors co-operate and support SFA-commissioned research and evaluation activities, initiatives and programmes

- 19.1 Prime contractors must support all SFA requests to participate in customer satisfaction and progression surveys and other research and evaluation programmes. Participation will typically include the provision of data, involvement in interviews and sharing information about work processes and outputs.

## Working with offenders

### 20 Customers in custody receive the same service as those in the community (subject to technical and security constraints)

- 20.1 The SFA supports the Ministry of Justice's [transforming rehabilitation strategy](#). Prime contractors must put in place a delivery model for offenders (in both the community and in custody) that clearly responds to

the new nationwide 'through the gate' resettlement services that transforming rehabilitation will introduce.

- 20.2 Prime contractors must not, under any circumstance, make any reference in any record to indicate that a customer is, or may be, an offender or ex offender.
- 20.3 Prime contractors must follow the relevant guidance when indicating that a customer is in the priority group 'adult offenders in custody and in the community and ex offenders' for the purposes of obtaining the relevant priority group funding rate and the submission of aggregated management information.
- Where a customer has self-declared themselves as a member of that particular priority group, prime contractors can use a suitable indicator to record such information which does **not directly identify** that a customer is an offender or ex offender, (for example they could use 'non-community' or similar).
  - Prime contractors must only indicate a customer is an offender/ex offender, where the customer has self-declared/volunteered this information.
  - Prime contractors must have processes in place to support the removal of the relevant indicator where the customer has requested this.
  - Prime contractors must not share information which identifies a customer being an offender/ex offender (or in the priority group listed above), with third parties (except where a data sharing agreement is in place).
  - Prime contractors must ensure that information which identifies an individual customer(s) as being an offender/ex offender (or in the priority group listed above), is not submitted to the SFA national data platform and/or management information systems.
- 20.4 Prime contractors must ensure that they do not use the restricted text, set out in Appendix A of this document.
- 20.5 Prime contractors must provide any additional assistance offenders may require to fully benefit from the service. For example, adults in custody may require help to book course places in preparation for their release.
- 20.6 Prime contractors must be proactive in sharing data with the prison clusters, including LMI trends in release/resettlement areas and the LEP employment and skills priorities in those areas.
- 20.7 Prime contractors must ensure a seamless link between the service in prisons and in the community including continuation of learning and progression.



- 20.8 Prime contractors must work closely with the National Offender Management Service (NOMS), prisons and Offender Learning and Skills Service (OLASS) providers to ensure the effective delivery of the service to people in custody, ensuring that there are transitional arrangements for offenders moving from custody to the community and for offenders in the community coming to the end of their sentence.
- 20.9 Prime contractors must work with community rehabilitation companies to ensure that effective local partnership and referral processes are agreed that will support secure data sharing, active risk management, tracking, support and follow-up arrangements for offenders in the community seeking support to move into learning or work.
- 20.10 Prime contractors must contribute to each governance board subgroup within the contractual area they cover.
- 20.11 To support the clusters to achieve targets and priorities, prime contractors must take account of the cluster profile and associated requirements, in particular the specific needs of female prisoners and young offenders (aged 18 to 21 years).
- 20.12 Prime contractors must provide a service across all prisons within their contract area, including the high security estate. The level of service in the high security estate must reflect the sentence length and type and be proportionate.

## **Workforce development**

### **21 The service is delivered by trained advisers who all hold appropriate and recognised information, advice and guidance (IAG) qualifications**

- 21.1 Prime contractors must engage with, and complete, SFA-produced National Careers Service online and face-to-face continuous professional development activities and programmes.
- 21.2 Prime contractors must ensure that all staff (including subcontractors) complete the SFA's online National Careers Service Best Practice Programme's essential learning modules within three months of the start of the contract or within three months of their date of appointment.
- 21.3 Prime contractors must ensure that all staff are trained and hold appropriate qualifications to deliver the service.
- 21.4 Prime contractors must comply with the SFA's annual workforce audit and all requests from the SFA for workforce data to support research and quality improvement activities.

## Data management

### 22 Data is submitted to the SFA

- 22.1 All prime contractors must ensure that their local data and management information systems meet the requirements set out by the SFA in the data security section and the data protection and protection of personal data section of the contract.
- 22.2 Prime contractors are responsible for the accuracy and completeness of data submitted and must have appropriate quality control mechanisms in place to ensure this.

### 23 The prime contractor will be data processor for data processed on behalf of the SFA in the operation of the National Careers Service. Data is managed, stored and transferred securely.

- 23.1 For those customers in custody, the data controller of information held by National Careers Service prime contractors is the Ministry of Justice (MOJ). Prime contractors must continue to use MOJ-approved prisoner management and data security arrangements in order to comply with the Rehabilitation of Offenders Act.
- 23.2 Prime contractors must ensure that all staff, including subcontractor staff, do not publish, disclose or divulge any personal data to a third party unless directed to do so in writing by the SFA.
- 23.3 Any hard copy documents containing personal data must be stored in a filing cabinet that can be locked and is certified to at least Security Equipment Assessment Panel (SEAP) Class 2.
- 23.4 Prime contractors must share a privacy notice and the terms and conditions of using the service with customers. A general privacy notice may include the following:

“The information you provide will be passed to the SFA and may be shared with other organisations for the purposes of administration, research and delivering the service to you. Your information will be handled in accordance with the principles of the Data Protection Act 1998 and at no time will it be used for sales or marketing purposes without your permission. For further details of how your data is processed, please view the privacy policy on the National Careers Service website.”

## **24 Data is entered, updated and submitted in a timely manner**

- 24.1 You must update individual customer records after each interaction in line with the obligations set out in the Customer Data Service Code of Connection.
- 24.2 You must record all customer outcomes on the customer record, regardless of any claim made.

## **Management information and reporting**

### **25 Prime contractors must submit robust and timely management information**

- 25.1 The National Careers Service Data Collection Service will be the primary source of management information (MI) data. However, certain MI will be returned manually using SFA defined templates.
- 25.2 Prime contractors are expected to submit a monthly data return through the Hub by the eighth working day of each month, as outlined in the prime contractor National Careers Service data collections guidance and associated specifications. These are all located in the data collections service area of the National Careers Service team site.
- 25.3 Where data collection and management information is submitted manually, using SFA-defined templates located on the [team site](#), these must be returned no later than by the eighth working day of each month by email to [nationalcareersreturns@sfa.bis.gov.uk](mailto:nationalcareersreturns@sfa.bis.gov.uk).
- 25.4 Prime contractors must supply additional management information as requested by the SFA.

## **Performance management**

### **26 Prime contractors must adhere to the performance standards and service levels set out in the contract**

- 26.1 Where prime contractors are found not to be meeting the requirements of the contract, including national targets and KPIs, performance-management interventions may be initiated.
- 26.2 As a minimum, performance management will be informed by:
  - monthly, quarterly and annual [performance monitoring](#) against agreed financial profiles and agreed national targets

- regular performance assessments against contribution to whole-service KPIs
- financial health, management and control mechanisms
- Ofsted inspection outcomes
- achievement and retention of matrix accreditation
- policy compliance and partnership activity
- performance against service level agreements
- data quality and security requirements

## **27 Subcontractors are monitored and well managed**

- 27.1 Prime contractors must ensure that they meet the minimum requirements for the management of subcontractors as set out in Schedule 2 of the contract and adhere to the requirements set out within the terms and conditions and funding rules.

## **Technical information security**

### **28 Prime contractors conform to government guidelines on security**

- 28.1 To demonstrate good security practices and awareness, we ask all prime contractors to implement a wider information security programme that aligns with industry best practice ISO 27001 and [HMG security policy framework](#).
- 28.2 Prime contractors must ensure that all systems used to access, process, transmit or store personal data are implemented in accordance with the contract.
- 28.3 Users accessing SFA data must be subject to the HMG Baseline Personnel Security Standard. If access to information relating to vulnerable adults or children is needed, there may also be a requirement for an enhanced Disclosure and Barring Service (DBS) check.
- 28.4 The SFA reserves the right to audit prime and subcontractors for compliance against these requirements at any time.

## **Operational information security**

### **29 Prime contractors protect personal data in accordance with appropriate legislation and SFA guidelines**

- 29.1 Prime contractors must always work on the basis that any personal data in emails, skills action plans, or any other recorded information should be kept to the minimum necessary to meet the needs of the customer and the business processes.
- 29.2 Prime contractors must not share access credentials such as log-in names or passwords; log-ins and passwords for any IT systems used to deliver the National Careers Service must be in line with the SFA's information security policy (ICT systems password policy document section 10).
- 29.3 Passwords must also be configured so that they cannot easily be guessed, for example, containing a minimum of eight characters, including alphanumeric characters and a mixture of upper and lower case letters.
- 29.4 Prime contractors must ensure that users of systems delivering the National Careers Service inform their line manager immediately if they believe that their credentials have been compromised.
- 29.5 All security incidents must be reported to the SFA immediately by email to your Consumer Services delivery manager and adviser and copied to [NationalCareers>Returns@sfa.bis.gov.uk](mailto:NationalCareers>Returns@sfa.bis.gov.uk) with the following subject 'Information Security Incident – Contract Area - yyyyymmdd'.

The initial report should contain as much information on the incident as is possible at the time. A security incident may be, but is not limited to, any of the following:

- A belief that an individual's password or account has been used by a third party.
- The theft of or loss of documents containing the personal or sensitive personal data of National Careers Service customers.
- The theft of or loss of a computer used to deliver the service (which captures or contains customer data).
- Infection of a computer or other device with a virus or malware.
- Exposure of a customer to the personal data of another customer.

Your delivery manager/adviser and/or the SFA security team will liaise with the individual who reported the incident until it is deemed to be resolved.

### **30 Security Classification: overview**

In conformance with the government security classification (GSC) scheme, data held by prime contractors will by default be classified as 'OFFICIAL' and potentially move to 'OFFICIAL-SENSITIVE' at points of storage of over 1,000 individual records. Protection of assets moving to 'OFFICIAL-SENSITIVE' will

primarily be achieved by further rigorous application of the ‘need-to-know’ principle.

The aspects of the service and corresponding security classification are as follows:

<b>Aspect</b>	<b>Security classification</b>
Customer data (individual records)	OFFICIAL
Customer data (data sets)	OFFICIAL-SENSITIVE
Documentation that details contractual matters relevant to the service	OFFICIAL
General system description documentation with no specific details of the aspects listed below.	OFFICIAL
All other documentation	OFFICIAL
Details of software used in the development or operational environment	OFFICIAL
Firewalls, switches, routers	OFFICIAL
System administration services	OFFICIAL
Hosting platforms	OFFICIAL
Auditing	OFFICIAL
Management Information	OFFICIAL

### **Subcontractors**

Where subcontractors are used in the delivery of this service the supplier shall advise the customer and forward details of the subcontracting companies to the customer.

### **Copies of data**

No unauthorised printed (hard copies) or electronic (soft copies) of data, held or processed, are to be retained without explicit agreement and approval from the customer. Unauthorised use of hard or soft copies of CDS data will be treated as a security incident.

### **Shared responsibilities**

The following provisions apply to items which are the responsibility of the customer, the supplier or are shared between them.

Primary responsibility for the security of the area-based prime contractor CRM platform, personnel, premises and assets lies with the supplier.

The supplier shall comply with all current and future legislation appropriate to the secure operation and use of the prime contractor CRM platform in providing the service to the customer.

## **Business continuity and disaster recovery**

### **31 Prime contractors provide evidence that their service delivery is sufficiently robust to ensure continuity of service**

- 31.1 Prime contractors must have in place a robust business continuity and disaster recovery plan which aligns to ISO 22301 and that can be made available to the SFA upon request.
- 31.2 Prime contractors must have appropriate controls in place to mitigate security breaches.

## **Technical support, feedback and complaints**

### **32 Customers can access technical support**

- 32.1 Prime contractor and customer technical support is currently provided by a third party supplier by the freephone 0800 100 900. Technical support relating to the CDS is provided by CoCo.
- 32.2 Customers, who wish to provide feedback or make a complaint about the service, must be directed to the National Careers Service website and the National Contact Centre. The only exception to this rule will be where a customer contacts a prime contractor with feedback or a complaint about the local service. In this instance, the feedback or complaint will be managed locally by the prime contractor concerned. Prime contractors must implement arrangements for recording feedback and complaints.

## **Audit**

### **33 The service will be auditable by the SFA**

- 33.1 Prime contractors must retain and make available evidence to support funding claims as set out in the funding rules and contract terms and conditions.
- 33.2 Prime contractors will be audited against the contract terms and conditions, the business rules and relevant funding rules.
- 37.3 Prime contractor IT systems may be audited to ensure they meet the necessary levels of security.

## Freedom of information and subject access requests

- 34** Under the National Careers Service contracts the SFA is the data controller and the prime contractors are the data processor within the meaning of the Data Protection Act.
- 34.1 A prime contractor must notify the SFA by emailing [FreedomofInformation@sfa.bis.gov.uk](mailto:FreedomofInformation@sfa.bis.gov.uk) within five working days if it receives a request directly from a customer to access personal information held about them. This is known as a subject access request.
- 34.2 Once the SFA has been notified it is then up to the prime contractor to proceed in handling the request in accordance with the Data Protection Act 1998. Under the Act they have 40 calendar days to respond to the customer from the date of their initial request.
- 34.3 The prime contractor must take all reasonable steps to identify that the customer is who they say they are before any information is securely released. This may include asking customers to supply proof of identity, where required.
- 34.4 Where a prime contractor is providing careers advice to customers claiming out-of-work benefits, the Secretary of State for Work and Pensions is the data controller.
- 34.5 The Department for Work and Pensions may approach a prime contractor for information on customers that have received careers advice as a result of a subject access request. The prime contractor must take reasonable steps to satisfy themselves that the request is genuinely from the department and should then comply with any instructions or requests by the department.
- 34.6 Where a prime contractor is providing careers advice to customers who are subject to active management by an offender manager in respect of an order or a licence, the Secretary of State for Justice is the data controller.
- 34.7 The Ministry for Justice may approach a prime contractor for information on customers that have received careers advice as a result of a subject access request. The prime contractor must take reasonable steps to satisfy themselves that the request is genuinely from the ministry and should then comply with any instructions or requests by the ministry.
- 34.8 On occasions a customer may make a subject access request directly to the SFA. In this case the SFA will make contact with a prime contractor and request information held on a customer on our behalf. The prime contractor should comply with these requests and respond by the date stated by the SFA.



- 34.9 If a prime contractor is unsure how to respond to a request for information from an individual or a government department they should email [FreedomofInformation@sfa.bis.gov.uk](mailto:FreedomofInformation@sfa.bis.gov.uk) for assistance at the earliest opportunity. This includes where an individual or organisation makes a general freedom of information request about any aspect of the National Careers Service as opposed to a request for information held on themselves.
- 34.10 Prime contractors may find the subject access request code of practice available from the [Information Commissioners Office](#) helpful.

## Appendix A - Working with offenders: restricted text

The following text must not be used when recording information about individuals in the customer record, skills action plan or any other record relating to the delivery of the service, where it could identify an individual as an offender or ex offender.

The list of prohibitive text below has been agreed by the SFA and the National Offender Management Service. The list is not exhaustive and prime contractors must ensure that their advisers (and those of their subcontractors) are aware of the restrictions and that extra care should be taken when recording customer details.

Base word	Variant 1	Variant 2	Variant 3	Variant 4	Variant 5
abet	abetting	abetted			
abscond	absconds	absconding	absconded		
abuse	abusive				
amphetamine					
arson	arsonist	arsonists			
armed					
asbo	anti social behaviour order	anti social behaviour orders	ASBOs	anti-social	
assault	assaulted	assaulting			
bail	bail hostel	bail hostels			
bigamy	bigamist				
blackmail	blackmailer	blackmailed			
bomb	bomber	bombed			
bribe	bribery				
brothel	brothels				
burglar	burglaries	burglars	burglary	burgle	
captivity	captives	captive			
cell	cells				
cocaine					
committed					
con					
concealment					
conviction	convict	convicted	convicts	convicting	
corrupt	corruption				
counterfeit	counterfeiter	counterfeiting			
crime	crimes				
criminal	criminals				
custody	custodial				
dealer	dealing	dealers			
defendant					
diethylamide					
discharge	discharging	discharges	discharged		
dishonest	dishonesty	dishonestly			
disorder	disorderly	disordered			
disqualified					
drug	drugs				
drunk	drunkenness	drunken			
ecstasy					
enforcement	enforcing				

<b>Base word</b>	<b>Variant 1</b>	<b>Variant 2</b>	<b>Variant 3</b>	<b>Variant 4</b>	<b>Variant 5</b>
extremist	extremists				
falsely	falsification	falsify	falsified	falsifying	
felony	felon	felons			
fight	fighting	fighters	fighter	fight	
fined	fine	fines			
firearm	firearms				
forge	forging	forgery	forged	forges	
fraud	frauds	fraudulent	fraudulently		
gaol	gaoler	gaolers	gaols		
GBH	G B H	grievous bodily harm			
guilty	guilt				
harass	harassment	harassing			
harbouring					
hdc	home detention curfew				
heroin					
hijack	hijacker	hijacked			
hm	Hms	h m	h m s		
HMP	H M P	Her Majesty's Prison			
HMPS	H M P S	Her Majesty's Prison Service			
illegal	illegally				
imprison	imprisonment				
indecent	indecently	Indecency			
indictment	indictable				
inducement					
inmate	inmates				
intimidate	intimidation	intimidating			
jail	jails				
judicial					
ketamine					
kidnap	kidnapping	kidnapped			
killing	killer	killers	killings	killed	kill
magistrates					
malicious	maliciously				
manslaughter					
methadone	meth				
misdemeanour	misdemeanours				
molest	molested				
mugger	muggers				
murderer	murder	murderers	murders	murdered	
mutilate	mutilated	mutilating	mutilation		
narcotics					
offence	offences				
offender	offenders				
paedophile	paedophiles	paedophilia	paedophiliac		
parole					
piracy					
pistol	pistols				

<b>Base word</b>	<b>Variant 1</b>	<b>Variant 2</b>	<b>Variant 3</b>	<b>Variant 4</b>	<b>Variant 5</b>
pornography	pornographic				
prison	prisoner	prisoners	prisons		
probation	probationary				
prostitute	prostitution	prostitutes			
rapist	rape	rapes	rapists	raped	
recidivist	recidivism	recidivists			
remand	remanded				
robber	robbers	robbery			
shoot	shooting				
shoplifter	shoplift	shoplifters			
slay	slaying				
solicit	solicits	solicitation			
stealing	steal	stole			
substance	substances				
summons	summoned				
suspect	suspecting	suspected			
suspended					
suspicion	suspicious				
terrorist	terrorists	terrorism			
threatened	threatening				
theft	thefts	thief	thieve	thieves	thievery
tout	touting				
trafficking					
treason	treasonable				
trespass	trespassory	trespassing	trespasser		
trial	triable				
tribunal					
undischarged					
uninsured					
unlawful	unlawfully				
victim					
violate	violated	violation	violating		
violent	violently	violence			
vulnerable					
VP	V P				
wanton	wantonly				
weapon	weapons				
witness					
wounding					
YOI	Young offender institution	Young offender institutions	Youth offender institution	Youth offender iInstitutions	YOIs
YOT	Youth offending team	Youth offending teams	YOTs		

## Appendix B - Glossary

<b>Term</b>	<b>Definition</b>
Achievement	Customers' take-up of education, training, or employment.
Activity	Some form of interaction has taken place with the customer.
Adult	Any customer who is 19 years and older.
Advice/careers advice	Usually a longer and more in-depth interaction than simply giving of information. It may be spontaneous or pre-arranged, and may be offered on an individual or group basis, through face-to-face or contact centre advisers. Avoid using 'careers guidance'.
Age range of services	The service is available to all adults in England. Any adult aged 19 and over (or 18 and over for Jobcentre Plus customers or those in custody) will be able to receive personalised help and support.
Area-based prime contractor (prime contractor)	The lead contractor delivering the area-based National Careers Service on behalf of the SFA in each regional area.
At a distance from the labour market	Adults who are not in receipt of benefits but who are not working and who are disinterested in returning to the labour market. Distant from the labour market (that is, the customer has not been in any type of work for two years or more).
Call-me service	The facility to request a call-back from an adviser through the website.
Capability and tools	The web capabilities (for example, to build a CV) which the service will provide to support the delivery of skills-based advice.
Carer	A carer spends a significant proportion of their life providing unpaid support to family or potentially, friends. This could be caring for a relative, partner, or friend who is ill, frail, disabled or has mental health or substance misuse problems. This definition is subject to review and consultation by the Department of Health.
Complementary support services	Agencies offering specialist support, for example in counselling, housing assistance or debt management to which prime contractors or subcontractors refer customers.
Common inspection framework	The inspection framework for all publicly-funded learning provision administered by the Office for Standards in Education (OfSTED).
Customer	An individual seeking service from the National Careers Service who receives a skills action plan.
Customer record	The mandatory data that must be kept within the prime contractor systems to evidence payment and audit requirements; to supply management information and to underpin customer journeys.

Customer experience	<p>What a customer hears, sees and feels when interacting with the service.</p> <p>Linked to the customer experience framework which describes how the service provides a blend of capability and tools to personalise the interaction based on the customer profile and needs.</p>
Customer need	<p>A customer want or need and the fulfilment of that need, which enables us to understand how the service will respond. The customer's experience differs depending on the customer profile and the desired outcome.</p>
Customer profiles	<p>Attributes (personal data including age, skill level and attitude) to describe the customer and allow us to personalise the service they receive based on who they are.</p>
Course directory	<p>Customers wishing to engage in learning are able to search for the course which is right for them through the use of the National Careers Service course directory, which will support them in making the decisions which are right for them. If used in web copy it is possible to also use the course directory.</p>
Economically inactive	<p>Of working age and not employed, not claiming benefits, not self-employed, not actively seeking work or not in full or part-time education.</p>
Email an adviser	<p>The facility to email an adviser through the website.</p>
External organisations	<p>Funding bodies, other providers and other organisations with which prime contractors interact for the benefit of customers and other users of the National Careers Service.</p>
Ex offender	<p>An individual who has been in custody, or has been supervised by probation, but isn't any longer.</p>
Facing redundancy	<p>A customer who has either received notice of redundancy or has concerns that they are in danger of being made redundant.</p>
Follow-up	<p>The formal follow-up process when customers are contacted for customer service purposes and to find out if they have entered learning, training, or work.</p>
Full-time education	<p>Learning which is sixteen hours or more a week.</p>
Interaction	<p>A single touch point or experience between a customer and the service.</p>
Information	<p>Provision of general information about careers or learning.</p>
Jobcentre Plus	<p>Jobcentre Plus is a government agency supporting people of working age from welfare into work, and helping employers to fill their vacancies. Avoid using 'JobcentrePlus' or 'JCP'.</p>
Key performance indicators (KPIs) and impact measures	<p>A set of measures that demonstrate the achievement of the service against defined national targets.</p>

Labour market information (LMI)	National, regional, and local information and analysis about current and future labour markets. In copy use labour market information but if abbreviated, use LMI.
Lifelong Learning Account (LLA)	Part of the National Careers Service customer website where the customer registers to access information and tools to help them progress in life and work.
Low-skilled	Adults who lack a Level 2 qualification and/or will be in low-skilled, low prospects jobs. Adults who experience barriers in the labour market. Adults lacking 'employability' skills and those needing more in-depth support to enable them to progress into training or sustainable employment.
Matrix standard	The required quality standard for all providers offering funded careers, skills and advice services.
Offender	An individual who has been in custody (to include those on remand who are, generally, unsentenced) and those in the community being supervised by probation.
OLASS	Offenders' Learning and Skills Service
Outcome payment	A focus to ensure that every interaction has a clearly communicated outcome which will support customers in progressing in work and life.
Part-time education	Learning which is fewer than sixteen hours a week.
Personalised	Based on the customer experience framework the service will use a blend of capability and tools to provide an appropriate outcome based on the customer profile and needs.
Priority groups	Priority groups identified for the National Careers Service.
Process	A series of steps/activities to document a workflow and derive an appropriate outcome such as a formal process which takes place when a customer is referred to, or from, one organisation to another with a booked appointment. To support the referral there will be a sharing of customer information.
Progression	A customer moving forwards in work and life either by finding employment, receiving or completing training or progressing in their existing job.
Service level	A service level is a measurement of performance which relates specifically to a prime contractor or supplier.
Service standards	A descriptor that sets out what the customer will receive from the service and demonstrates and measures how this will be delivered.
Signposting	A less formal process than a referral. A customer is informed about the service or another organisation that could help (for example, if specialist advice is needed).
Skills action plan	A written record of an interaction which lists the main points discussed and the actions which the customer and the adviser have agreed to carry out.

Skills health check	This is a universal skills health check designed to provide a coherent and flexible approach to skills assessment and personal action planning. The outcome of the assessment is a report which a customer could act on by themselves or go on to discuss with an adviser. In web content, use skills health check to describe the process and skills health check tool when referring directly to the tool.
Subcontractor	Agencies formally contracted to the prime contractor to deliver the service on their behalf.
Sustainable employment	Employment of a minimum of four weeks' duration. The Jobcentre Plus definition is staying in work for six months, that is, for individuals to leave, and remain off benefits, for six months or more.
Universal service	A universal service describes the core offer (information, support and advice to support progression in work and life) of the service available to customers in England.
Young people	Any customer who is 13 to 18 years old.





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