

RESEARCH & EVALUATION SPECIFICATION

**Quality Assurance and Continuous
Improvement programme for the National
Careers Service**

January 2023

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CROWN COMMERCIAL SERVICE RESEARCH FRAMEWORK AGREEMENT

Invitation to Tender

To build, promote and deliver an independent quantitative and qualitative continuous improvement approaches and resources for the National Careers Service.

The purpose of this document is to invite tenders to carry out the Customer Satisfaction, Progression Surveys and Qualitative programme on behalf of the National Careers Service as specified in this document. This independent evaluation and review to support continuous quality improvement across the National Careers Service.

You should note that:

- This project is tendered through the Crown Commercial Service Dynamic Purchasing System Research and Insights agreement (RM1626) on behalf of the Department for Education (DfE)
- The ITT does not imply a commitment to contract
- DfE reserves the right not to award an Assignment Contract as a result of this ITT
- No Assignment Contract shall be formed until the selection contractor receives a Commissioning letter signed by a duly authorised representative of the Customer
- If you choose to tender then you are required to bear all the costs incurred by you in the preparation of that tender

All information supplied in the specification should be treated as confidential and disseminated only on a “need to know” basis.

Enquiries about this invitation to tender should be made using the messaging facility on the e-tendering portal.

The Department for Education

This project is being tendered through Crown Commercial Service Dynamic Purchasing System Research and Insights agreement (RM1626). It will be led, managed and funded by the Department for Education.

Background

The National Careers Service

The National Careers Service is funded and managed by the Department for Education (DfE). The National Careers Service provides free careers information, advice, and guidance to both young people (from the age of 13)

and adults through a website, webchat, and a telephone helpline. In addition, the community based National Careers Service can be accessed for face-to-face and telephone careers information, advice, and guidance in the community by adults aged 19 and over (18 if Not in Employment Education or Training (NEET)).

The area-based National Careers Service was initially launched in April 2012 and alongside apprenticeships, traineeships, T Levels and advanced learning loans and a range of other initiatives which represent an important strand in the Government's ambition to:

- Grow an internationally competitive skills base
- Create sustainable jobs and foster progression to support economic growth
- Create a dynamic and efficient skills system with informed learners and ownership by employers, supported by high quality, impartial careers advice
- Prioritise help to apprentices, young adults, low-skilled other groups that need skills support if they are to make a vital contribution to society
- Contribute to the Levelling Up programme

The service is delivered via three channels; customers can speak to an adviser, either on the telephone or face-to-face and they can access the National Careers Service online (where there is also the facility to email an adviser). The three channels operate as a single integrated service where customers can be referred/ signposted between them to provide the support that best suits their needs. Approximately 750 advisers deliver the service across the telephone, face-to-face and web channels to around one million customers each year across England.

There are five prime contractors who are responsible and accountable to the DfE for the delivery of the National Careers Service online, by telephone and in the community. The service is delivered under one consistent national brand across England; however, it is shaped locally to respond to the needs of local partners and employers.

The DfE is committed to helping people realise their potential and gain the skills they need to progress in life and work. Therefore, the National Careers Service is required to support people (customers) by providing professional, high quality, impartial careers advice and guidance. This offer will have a greater focus on digital tools and enhanced support to customers facing particularly barriers and challenges.

The National Careers Service helps people to think flexibly about the skills that may be needed in the future, including helping them make realistic plans and choices to realise their potential in an ever-changing economy. The service plays a direct and active role in connecting local people to local opportunities, working in close partnership with local business and educational institutions.

The National Careers Service Team has designed and implemented a comprehensive quality assurance and continuous improvement programme for the National Careers Service. The quality assurance and continuous improvement programme drives improvements across the service by analysing the customer experience, identifying and systematically sharing best practice and regularly assessing the performance, quality and impact of the frontline staff who deliver the service.

The Vision

The vision of the National Careers Service provision is to play a pivotal role in meeting the Government's ambition for Levelling Up, contributing to the development of the [2017 Careers Strategy](#) and the vision for creating a careers system that provides impartial, lifelong careers advice and guidance to people when they need it, regardless of age, circumstance, or background (as set out in the [Skills for Jobs White Paper](#) - published January 2021). Thus, creating a thriving careers system, accessible to everyone, is at the heart of the focus on social mobility, offering opportunity to everyone, making Britain fairer.

See the following link to find information about the Funding Rules and priority groups.

[National Careers Service area-based contracts funding rules - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/national-careers-service-area-based-contracts-funding-rules)

The importance of quality

The DfE is committed to ensure that its investment in the National Careers Service is realised through customers accessing high quality careers information and advice from professional, highly skilled, careers advisers.

The Department is committed to driving up the quality of the National Careers Service. The standard contract management and quality assurance processes ensure that sound arrangements are in place to deliver a good service for the service users. This is complemented by ongoing work into customer satisfaction and progression.

Prime Contractors must ensure that they (and their subcontractors) meet the minimum quality requirements for the delivery of impartial careers information, advice and guidance as part of the core offer of the National Careers Service. These are;

- a. Holding and retaining the matrix Standard. 100% of organisations delivering the Community based Service to be accredited to the matrix Standard within six months of the start of the Contract
- b. Being subject to and complying with the Ofsted Common Inspection Framework for Further Education and Skills

- c. Compliance and full participation with any DfE initiatives, research or programmes to assess, measure and improve the quality of the National Careers Service

The Ofsted inspections that concluded in spring 2017 found that 4 of the National Careers Service Prime Contractors were rated good and two were rated outstanding.

It is within this context of quality assurance and inspection activity that the Department introduced a programme of independent evaluation and review that will support continuous quality improvement across the National Careers Service by monitoring, evaluating, and providing feedback about the actual quality of service received by customers from National Careers Service face-to-face and telephone advisers.

Aims and Objectives of the Quality Assurance and Continuous Improvement Programme

The Department for Education wishes to continue to collect independent and robust data about the satisfaction with and impact of the National Careers Service to demonstrate that the service does make a difference and contributes to national economic growth. In the current financial climate, hard evidence is required to show individual progression into learning and work.

Aims

The priority of the independent National Careers Service quality assurance and continuous improvement programme is to:

1. Maintain and improve customer perception of satisfaction and progression
2. Gain targeted customer insights
3. Capacity Building: drive continuous quality improvement

Therefore, there is a requirement to generate clear recommendations that will drive continuous improvement through independent assessment of the end-to-end customer experience, providing validation and oversight to ensure the successful delivery of the National Careers Service contracts identifying areas for improvement.

To equip the service with external knowledge and resources to support sustainable quality improvement and to promote a learning culture across the National Careers Service network.

To create a consistent self-evaluation programme for National Careers Service prime contractors, and to build a collaborative working environment to improve the service and share best practice.

To provide independent validation of the outcome-based funding model and assurance that the Service delivered is having the impact claimed by prime contractors.

Objectives

1. Customer Perception

To gather objective, verifiable evidence about customer perceptions of the service through telephone and online surveys

The survey is to be designed to assess the impact of careers information, advice, and guidance services. The purpose of this evaluation is

- a) to assess the customer satisfaction with the service delivered by the National Careers Service
- b) and how many customers progressed after receiving information, advice, and guidance from the service.

Progression occurs when a customer enters learning or enters paid employment or advances in employment following participation in one or more information and advice sessions with a National Careers Service adviser.

Progression should be measured in terms of the impact that the National Careers Service had to the customers progression to paid employment and learning outcomes.

As part of this evaluation there will be two separate surveys. One of the surveys will measure progression and the other will measure customer satisfaction. Therefore, two sets of questions will need to be developed. The results will be reported in one document, but the surveys will draw from at least two different samples.

Satisfaction

The key indicator is the level of customer satisfaction with the service received, in percentage terms. We also wish to gather information about factors influencing satisfaction and dissatisfaction with the service to enable improvements to be made in how the service is delivered.

Progression

The Department wishes to identify and measure the impact of the information and advice provided by the National Careers Service to customers. Key measures will include at least the following:

- percentage of customers who entered learning and training
- percentage who entered employment
- percentage who progressed in work
- percentage who achieved a soft outcome e.g., increased confidence, motivation, or decision-making

Qualitative interviews will explore:

- the reasons why a customer has not progressed since they accessed the National Careers Service
- the reasons why customers have progressed and how this has happened
- the extent to which there is a causal relationship between receiving careers information, advice, and guidance (IAG) and progression outcomes

The overall aims of the research are:

- To gather customer data, analyse and provide a critical commentary on Key Performance Indicators (KPIs) for the National Careers Service which looks at specific measures of how satisfied customers are with the service and the progression that they experience following their contact with a National Careers Service adviser.
- To understand customer views of the service and provide answers to questions such as, what are the overall levels of satisfaction? How does this differ by type of customer? What are the key factors that influence satisfaction? Do outcomes differ between different customer groups? and, what are the causes of dissatisfaction?
- To measure variation in performance among prime contractors that deliver the service on behalf of the National Careers Service. The research must allow for comparisons of customers receiving information, advice and/or guidance face-to-face, by telephone, by web, and in different settings including Jobcentre Plus offices, high street locations, and community centre.

Provide raw dataset of results in SPSS and Excel for the annual report and as required.

In addition to the reports to be produced by the contractor, the Department will require a mix of scheduled monthly data, comprehensive quarterly reports and separate, 'free standing' reports that analyse and comment on satisfaction and progression data by selected categories and for specific customer groups, including:

- 18–24-year-old NEETs
- Younger customers (13–18-year-olds)
- Customers with learning difficulties and/or disabilities
- Low-skilled adults without a level 3 qualification
- Adults who have been unemployed for more than 12 months
- Single parents with at least one dependent child living in the same household
- Adults aged 50 years and over who are unemployed or at demonstrable risk of unemployment.

Occasional analysis of satisfaction/progression-related data sets from overlapping projects as required (e.g., targeted customer insights data, best practice activity outputs). Customised reports that analyse satisfaction and outcomes by a combination or cluster of specific customer characteristics (e.g., combinations of age, region, employment status, prime contractor, face to face or telephone contact, etc.)

In terms of testing the causal relationship, we want to gain a qualitative understanding of the impact of careers IAG services, in particular the contribution careers IAG makes to decisions and behaviour or to moving people closer to learning and paid employment. We also want to estimate the additionality of IAG, in terms of how many more people entered learning or employment as a result of receiving careers IAG.

Under the present arrangement customer satisfaction is collected one month after the customer has received the initial service and progression data is collected six months after the customer's contact with the service. We aim to continue ongoing data comparisons with previously published customer satisfaction and progression survey results; however, we are interested to hear alternative approaches which take account of how valid comparisons can be made with previously published customer satisfaction and progression surveys.

2. Targeted customer insights

To gather targeted customer insights about the operation of the physical and digital processes and systems of the services and to understand how they impact on end-to-end customer journeys, impacts and outcomes. The supplier will be expected to decide on a variety of methods of testing the quality of the National Careers Service delivery to test and evaluate the quality of the careers advisers' performance. The primary goal is to assess and ultimately improve customer satisfaction.

The purpose of this element of the quality programme is to communicate how the successful supplier will gather real-time, objective intelligence about specific aspects of the end-to-end customer journey. Although not exhaustive, typical areas of focus might include:

- Interviewing skills - quality interviewing – process and content
- Use of labour market information
- Motivating and moving customers on
- Partnership working and referral activities
- Encouraging customer digital and self-serve skills
- The appointment booking process – the customers experience of accessing the service
- Efficiency and effectiveness of the customer call back process
- Contracting with the customer (i.e., setting expectations – do they know what to expect from the service)

- Customer wait time following telephone or email enquiries
- To 'nudge' prime contractor behaviour towards prioritising the improvement of specific aspects of the customer journey
- Use of the Customer Charter
- Customer dropout/loss issues
- Exploration of common customer complaint areas or issues of concern for the department
- Action planning with the customer and the usefulness of the action plan
- Use of National Careers Service website and tools (skills health check, job profiles, etc)
- Focussed work on groups (e.g., young people/ over 50 groups)
- Promotion of independent career management skills

In the context of this work the term 'customer' will usually refer to ordinary members of the public who access the service via the website or by speaking on the telephone or meeting with an adviser face to face. However, the term 'customer' can include employers, teachers, providers, and parents.

3. Capacity Building - Continuous Quality Improvement

- Prime contractor self-evaluation and review of service delivery across the prime contractor network
- To increase and improve the capacity and capability of National Careers Service prime contractors to measure and evaluate the impact and benefits of their service delivery in a consistent fashion across the network
- To promote effective collaborative working and skill sharing with a supplier that produces or curates learning resources, combines internal data and intelligence from the service with independent data, to provide a richer analysis of how the service operates and how it can be improved

Over time each of the National Careers Service's 5 prime contractors have developed and implemented their own unique, in-house quality assurance (QA), improvement and evaluation arrangements to support service delivery. The range and diversity of these approaches, tailored to the challenges, organisational culture and business needs of each prime contractor is an important strength of the National Careers Service.

The successful supplier will be required to respect each prime contractor's internal quality assurance arrangements while working closely with the DfE National Careers Service Team and the prime contractors to explore, negotiate and develop a common, consistent, overarching quality evaluation framework and agreed principles that will enable valid comparison, innovation, and continuous improvement within and between prime contractor networks.

The overarching quality evaluation framework will enable the Department to RAG-rate and compare qualitative data around adviser-led careers IAG sessions, adviser assessment, evaluation of telephone recordings and webchat transcriptions. It will support the creation of exemplars of high-quality delivery

and offer objective insights into the process of stakeholder engagement. Reporting should occur on a quarterly or 6 monthly basis

To promote effective collaborative working and skill sharing with prime contractors that produces or curates learning resources, combines internal data and intelligence from the service with independent data, to provide a richer analysis of how the service operates and how it can be improved

The supplier will be required to work closely with the DfE National Careers Service team and all National Careers Service prime contractors to deliver the following three objectives:

Objective 1: share the National Careers Service's vision, values, standards, brand and expected behaviours of all customer-facing prime contractor and subcontractor staff

Delivery requirement: Work collaboratively with prime contractors to agree how key learning and messages about the National Careers Service will be shared with new and experienced advisers, how take up will be monitored and how the content will be kept current and refreshed

Objective 2: drive and embed a culture of structured collaborative working and continuous improvement across the prime contractor network

Delivery requirement: facilitate prime contractors to work together at an operational level to solve, or make measurable progress in resolving common delivery problems (e.g., improving the booking/call back process, customers failing to attend IAG appointments, closer working with JOBCENTRE PLUS , enabling more telephone and face to face customers to use digital tools, supporting customers to enter or re-enter labour and learning markets more quickly)

Objective 3: Identify and agree minimum learning and development resources focused on working with customers, that all advisers should be aware of and incorporate into their everyday practice

Delivery requirement: curate or produce a tailored suite of central learning and development resources – specific to the needs of National Careers Service advisers - that are informed by and in response to analysis of data and intelligence mined from the operation and behaviours of the National Careers Service and its customers

Methodology Summary

Customer satisfaction and progression survey deliverables

In summary, the successful supplier will deliver and have regard to the following:

Customer Satisfaction

To enable ongoing valid comparisons with previously published customer satisfaction and progression survey results, a future contractor must ensure that they employ a methodology that is wholly consistent with the current survey arrangements. Moving forward, different but compatible approaches may be required for new areas of research, such as the requirement to gather the views of specific customer priority groups and to accommodate changes and challenges that arise as a result of any changes to the delivery model of the service from October 2022.

Customer contact information will be provided by the DfE's National Careers Service team. Details for customers who have agreed to be contacted for research purposes will be supplied.

It is important that any methodology proposed by a supplier fully complies with the requirements of GDPR regulations. Suppliers will need to ensure that they can demonstrate that they have processes, procedures and systems in place that adhere to GDPR requirements.

The new contractor will need to work closely with the Service's digital team to ensure that the current online customer satisfaction survey that gathers customer views about the National Careers Service's digital offer is robust and fit for purpose. Currently, the number and percentage of website customers sharing their views of the National Careers Service's digital tools and products (such as the Skills Health Check, webchat, chatbot, Job Profiles, Discover Your Skills and Careers, Find a Course, etc) is only sufficient to provide a 'flavour' of user perception and falls well short of being statistically significant.

Bidders will be expected to propose approaches that may contribute to a significant uplift in the number of customers completing online surveys about the National Careers Service website. Proposals might range from increasing the prominence of the survey, reviewing the means of capturing customer views about the website, through to redesigning the survey. The online survey will continue to need to be accessible, screen reader friendly and easy to use on desktops, tablets, smartphones and other devices. Subject to normal security protocols and data protection arrangements, the DfE will make the relevant data available to the successful contractor.

Guidance regarding the current research arrangements and important considerations for the satisfaction and progression surveys are set out below:

The customer satisfaction survey

- Face to face and telephone customers: approximately 730 telephone interviews are conducted each month. These interviews occur one

month after the customer has had an information and advice session with a National Careers Service adviser.

- Online customers: satisfaction data about the National Careers Service website products and tools are gathered via a survey on the National Careers Service website. The survey is promoted via a permanent banner message on the website home page. This approach is meeting with very limited success and requires review.

The customer progression survey

- Face to face and telephone customers: the supplier will conduct approximately 500 telephone interviews each month. These interviews take place six months after the National Careers Service adviser has conducted a careers information and advice session with the customer.
- National Careers Service website customers: this is conducted via an online survey sent by e-mail to online customers (who provide an email address) three months after completing the website survey.

In addition to reporting satisfaction and progression rates, the surveys will provide trend analysis of customer outcome and satisfaction by analysis of variables such as priority group, employment status, age, region, gender, and ethnicity.

Sampling

As far as possible, where customer groups and survey requirements remain unchanged, sample sizes, weightings and the demographic profile of customers should be consistent with published National Careers Service satisfaction and progression surveys. Where new customer groups or categories for analysis are proposed (e.g., over 50, single parents with dependent child, views of 13-18 year olds, etc.) contractors should consider and propose appropriate methodologies to gather and analyse data. Fieldwork should be carried out on an ongoing monthly basis.

Reporting

Reporting on customer satisfaction and progression will be required on a quarterly basis and, where appropriate, must be consistent with the current arrangements to ensure comparison with earlier results.

The main audience for this evaluation is the Department for Education. Other audiences include National Careers Service prime contractors and key stakeholders in the careers information, advice, and guidance (IAG) sector.

The insights will be utilised by the Department's National Careers Service Quality Team will use the findings to:

- Assess performance and provide a point of comparison with reported outcomes from prime contractors
- inform quality improvement challenges, opportunities, and processes within the Department.
- drive continuous service improvement
- inform the contract management process at both a regional and national level to improve the quality aspects of the service
- report progress to key partners and stakeholders

During the course of this contract the supplier will also make available the raw data collated and developed to the DfE and provide this upon request. This will enable the Department's National Careers Service team to make real-time comparisons and analysis with other projects as well as the data that being is collated from prime contractors.

The progression findings will be of particular interest to the DfE, other government departments and a wider audience, including academics, as they will provide information about the impact of information, advice and guidance services and contribute to important evidence and empirical data to inform similar national and international initiatives.

This project is a highly important part of an evaluation strategy which is being developed to assess the longitudinal outcomes of careers IAG services overall for individuals and the wider economy.

Some of these processes may require investigation by routes other than the traditional customer survey. We will expect suppliers to suggest appropriate methodologies within their bid submissions.

Suggested Methodology Satisfaction and Progression	Qualitative telephone interviews (CATI system) Statistical and qualitative analysis of output/outcome data for impact evaluation Focus groups/ face-to-face or subcontracted interviews (e.g. over 50, young people, analysis of related projects, etc.)
Total number of Interviews (satisfaction survey) Total number of Interviews (progression survey) Total number of website user interview responses Total number of occasional and related reports <i>These figures are subject to discussion and review</i>	Sample size 8,750 (approx.) per year 7000 (approx.) per year 18000 (approx.) per year 24 (approx.) per year
Re website survey	Access to or development of appropriate software to collect website data is essential. Please see above comment

	(methodology summary) re the need for more reliable and robust data than present survey.
Project completion date and extension details	30 September 2025 (subject to review each fiscal year) NB The Department reserves the option to extend the contract and retain the services of the successful contractor for a further one year i.e. 27 +1-year extension subject to satisfactory performance by the contractor; the continuing availability of funding; and the continued commitment of the DfE to the programme.

Targeted Customer insights

Suppliers are expected to submit the processes they will undertake to gain targeted insights. These may require investigation methods other than the traditional customer survey and may include covert assessment to identify the usefulness, quality and consistency of careers information, advice and/or guidance they receive from face-to-face and telephone channel advisers. We will expect suppliers to suggest appropriate methodologies within their bid submissions.

Continuous Improvement

Prime contractor self-evaluation and review of service delivery across the prime contractor network

The supplier should propose appropriate strategies and approaches that will enable the DfE National Careers Service team to develop an umbrella/ overarching quality evaluation framework. The framework will enable the Department to monitor, compare and rate (on a quarterly or half yearly basis) each prime contractor's QA mechanisms and assess how effective those QA arrangements are in delivering a quality careers IAG service to their customers via face to face, telephone, and webchat. The focus will be on the qualitative content of customer interactions, rather than a quantitative evaluation that measures length or number of interactions.

Possible methodologies might include:

- review of each prime contractor's current QA arrangements
- derivation of common themes
- workshops, review of most appropriate/popular models
- discussions with DfE team about expectations

The successful supplier will need to demonstrate how they will engage with prime contractors and the Department to gather information about prime contractor QA and self-evaluation systems and procedures

- The collection and analysis of objective, prime contractor level data that enables comparison between prime contractors of the impact of their processes and systems on customers is an essential element of this task
- Information about prime contractors' quality assurance, quality improvement and self-evaluation arrangements must not be shared between prime contractors without explicit consent from the contributing prime contractor
- The successful supplier will need to demonstrate how they will secure 'buy-in' from prime contractors to deliver on the key three tasks related to this element of the quality programme
- A strategy approach to develop and/or curate appropriate careers IAG learning and development (L&D) for the National Careers Service staff. The L&D will be distinct and do not replicate resources already developed and maintained by the prime contractor network. These resources are hosted on the 'Coach' platform

Results will normally be presented in PowerPoint with supporting statistical data. However, from time to time the Department will require a narrative report with summarised data.

* The department welcomes arrangements which involves a bidder outsourcing or subcontracting some of the tasks set out in this specification to a partner or partners with greater experience, expertise in meeting different elements of the contract. However, full details of the rationale for this approach together with the credentials, expertise and track record of the partner(s) would need to be included in the bidder's submission.

Project Management Arrangements

A Project Manager will be allocated for this project. Full details will be given following contract award.

Timescales

Please confirm that you can meet our deliverables based on the timescales indicated with clear milestones. It is important to ensure that you are realistic with the timings as it will be assumed that your proposal will be based on timings that you would expect to work to for a project in this category.

Quality Programme Deliverables

We require the following deliverables:

DATE	ACTIVITY
June 2023	Project inception and scoping handover
June 2023	Project initiation document (with detailed actions and timescales)
1 July 2023	Project start date
Monthly throughout the contract live	Update meetings
Monthly, quarterly and annually	Submit PowerPoint Presentation of findings and recommendations to Department
Annually	Annual PowerPoint presentation to DfE
Annually	Submit an annual report – a critical and comparative evaluation and analysis of data
On-going throughout the lifetime of the contract	Develop CPD materials to complement or facilitate advisers' knowledge or training
Quarterly	Meetings with prime contractors
6 monthly	Attendance at a minimum of two planning/review/evaluation meetings per year
	Availability to respond flexibly to (email and telephone) ad hoc queries within two working days, as required
End of contract	Contract evaluation at the end of the contract

Procurement Timeline

These are our intended timelines. We will try to achieve these but, for a range of reasons, dates can change. We will tell you if timelines change.

DATE	ACTIVITY
23 January 2023	Launch of Procurement via Jaggaer e-Tendering Portal
23 January 2023	Clarification period starts
10 February 2023 17:00	Clarification period closes (“ Bid Clarification Deadline ”)
13 February 2023 17:00	Deadline for the publication of responses to Clarification questions
03 March 2023 17:00	Deadline for submission of Bid (“ Bid Submission Deadline ”)
06 March 2023	Commencement of Evaluation Process
22 March 2023	End of Moderation Process
30 May 2023	Proposed Award Notification Date
31 May 2023	Expected execution (signature) date for Contract
01 June 2023 – 30 June 2023	Transition and Mobilisation
01 July 2023	Expected commencement date for Contract

Geographic Areas

The 9 area regions are managed by 5 National Careers Service community based contractors from October 2022. The 9 regional delivery areas are as follows:

- East of England & Buckinghamshire
- East Midlands & Northamptonshire
- North East & Cumbria
- North West
- London
- South East
- South West & Oxfordshire
- West Midlands & Staffordshire
- Yorkshire & the Humber

