



Department  
for Education

# Management of the Matrix Standard

- **Market Engagement Event for the Assessment and Accreditation Body to manage the Matrix Standard**
- **21 May 2024**

# Agenda Tuesday 21 May

- Introduction
- Housekeeping – Sharon Hutchinson
- Presentation – matrix Standard – Jenny Wallis
- TUPE and procurement time table – Sharon Hutchinson
- Q&A



# Housekeeping



Can all attendees please remain on Mute for the duration of the presentation, this will ensure there are no distractions from background noise.



Please submit any questions via Microsoft Teams chat function.



# Background

- ❑ The **matrix** Standard was launched in 2002 and is the intellectual property of the Secretary of State for Department for Education (DfE) and is Crown Copyright. The standard assesses the delivery of an organisation's information, advice and support services on careers, learning and work. [www.matrixstandard.com](http://www.matrixstandard.com)
- ❑ The Standard has been developed to assess any delivery mode, face-to-face, training and learning delivered remotely, and website/online.
- ❑ It consists of 7 elements. Each element is made up of criteria, all of which have to be met to achieve the standard. The elements are;
  - ❑ Purpose
  - ❑ Resource
  - ❑ Offer
  - ❑ Delivery
  - ❑ Outcomes for individuals
  - ❑ Impacts for organisations
  - ❑ Continuous Improvement
- ❑ Organisations are assessed against the standard every 3 years. Continuous Improvement Checks (CIC) are carried out annually.
- ❑ The priority for the standard usage is within England and the rest of the UK. Any approaches from outside the UK should be discussed with the DfE.



# Background

## ☐ **Assessment types**

- ☐ Initial Assessment
- ☐ Assessment Review
- ☐ Second Stage assessment/retaining assessment.

- ☐ Most assessment are carried out by a single **matrix** Practitioner but in some cases with large multisite organisations a team of practitioners are needed, with a lead Practitioner who co-ordinates the assessment.

## ☐ **Continuous Improvement Checks (CIC) 1 and 2**

- ☐ CIC are an integral part of the accreditation. The annual checks are carried out by the assessor to ensure the organisation is continuing to improve its delivery.



# Role of the matrix Standard Assessment and Accreditation Body

- ❑ The Assessment and Accreditation Body (AAB) manages the process and allocation of an application for assessment or an assessment review. This includes –
  - ❑ Receiving application for assessment and sending out reminders at regular interval before re-assessment date
  - ❑ Allocation of **matrix** Practitioners for new assessments.
  - ❑ Ensuring assessment plans are made by **matrix** Practitioners.
  - ❑ Reports are received and quality assured.
  - ❑ Quality assured reports are sent to the organisation along with congratulations pack, plaques and information on the use of the quality mark.
  - ❑ All CICs are carried out and recorded.
  - ❑ Receiving payments for assessments and paying **matrix** Practitioners .
  - ❑ Have a complaints process in place.



## Role of the Assessment and Accreditation Body continued

- ☐ Promoting the **matrix** Standard to organisations to increase uptake and expand the use of **matrix** Standard to a wider audience.
- ☐ Managing and maintaining the **matrix** website to ensure the materials and contents are up to date.
- ☐ Build and refresh an accessible resource bank of high-quality case studies from different sectors and organisations to show the benefits of the **matrix** Standard.
- ☐ Managing the register of independent **matrix** Practitioners:
  - ☐ Ensuring Practitioners meet the conditions of registration on an annual basis.
  - ☐ Provide Continuous Professional Development opportunities for Practitioners.
  - ☐ Review Practitioner performance.
  - ☐ Recruit and train new Practitioners as required



# matrix Practitioners

- ❑ These are self-employed, independent assessors. Practitioners carry out all **matrix** Assessment and Continuous Improvement Checks (CICs).
- ❑ Currently there are 27 Practitioners on the register.
- ❑ Role of Practitioners:
  - ❑ Plan and carry out the assessment.
  - ❑ Decide if the organisation meets the Standard or does not meet the Standard.
  - ❑ Provide feedback to the organisation and a written report.
  - ❑ Practitioners carry out annual CICs with each organisations they have assessed.





# Funding and Contract Status

- ❑ This is a “**Concession contract**”. All activities carried out by the AAB are funded out of the income received from the assessment fees and the Practitioner registration fees.
- ❑ In the event of the current provider not bidding or being unsuccessful, a proportion of the funds (to be agreed) held in the current provider for prepaid assessments and CICs, but have not been carried out, will be transferred to the successful bidder.



# Facts and Figures

- ❑ The fees charged to organisations are set by the DfE. Currently organisations pay:
  - ❑ £600 per day exclusive of VAT (with a pro-rata payment per half/ quarter day) Practitioners receive £380 Per day with pro rata payments.
  - ❑ A fee for the CIC (£300 exclusive of VAT in total for the 2 CIC). Practitioners receive £95 per CIC.

Travelling fees are paid for by the organisation who is being assessed which is capped at £12 Following the Education Select Committee we have agreed to develop a more intergrated careers information and advice service for young peopple and adults. This is due to be tendered in 2026. Part of the development of the new service will be to learn from the current quality assurance systems and for the future develop an integrate qualtiy assurance system.

To ensure the continuity of the delivery of the current adult careers service we are seeking approval to procure for an organisations to manage the the **matrix** Standard which from January 2025.



0 per day on site.

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- ❑ Any increase in the fees charged must be agreed with the DfE before being implemented

# Organisations

- A wide variety of organisation are accredited to the Standard, from sole traders to multisite colleges.
- Some organisations including the National Careers Service and their subcontractors are contractually required to hold the Standard. All Further Education Colleges and 6<sup>th</sup> Form Colleges in receipt of the Adult Education Budget are required to hold the Standard.
- Some local authorities and Mayoral Combined Authorities, including the Greater London Authority, require some of their contractors to hold the Standard to ensure the quality of delivery.



# Volumes

## Matrix Accreditation Organisations and CIC over the past 3 years

Year	Organisation accredited to the standard
2021	1,555
2022	1,546
2023	1,487

Year	CIC year 1	CIC year 2
2021	512	472
2022	520	511
2023	490	489



# Volumes

## Matrix Assessment (Initial Assessments, Assessment Reviews and Second Stage Assessments)

Month	2021	2022	2023
January	36	37	36
February	48	48	38
March	83	65	51
April	51	36	29
May	57	59	51
June	59	54	56
July	58	40	26
August	23	27	36
September	35	38	28
October	45	44	48
November	52	53	52
December	41	43	33
<b>Total</b>	<b>588</b>	<b>544</b>	<b>484</b>



# Management information

- ❑ **The DfE requires the following management information monthly:**
  - ❑ the monthly number of requests for assessment, broken down into organisations new to the standard, assessment reviews, second stage reviews and continuous improvement checks,
  - ❑ the cumulative the number of certified organisations;
  - ❑ the cumulative number of certification reviews carried out during the period;
  - ❑ the cumulative number of organisations not applying for re-accreditation and de-accreditations .  
(Reasons should be given for not applying and de-accreditations);
  - ❑ the number of practitioners on register;
  - ❑ Number of assessments undertaken in the month;
  - ❑ Overall retention rate of organisations (including a clear method of calculating the retention rate figures)
  
- ❑ **The assessment body will also keep:**
  - ❑ Contact details for certified and formerly certified organisations
  - ❑ Type of organisation.



# Key Performance Indicators

Requirement	Standard
<b>KPI 1</b> All new assessments are allocated to a registered matrix practitioner using a clear set of allocation criteria.	Within 7 working days of receipt of the booking form
<b>KPI 2</b> All assessment plans are received from the matrix practitioners and agreed by the assessment body	Within 7 working days of receipt (9 working days for a team assessment)
<b>KPI 3</b> All assessment final reports are received from the matrix practitioner following the completion of the assessment.	Within 7 working days of the assessment being completed (9 working days for a team assessment)
<b>KPI 4</b> All assessment reports are quality assured by the assessment body and the final report sent out to the organisation.	Within 7 working days of receipt from the practitioner (9 working days for a team assessment)
<b>KPI 5</b> Retention of matrix accredited organisations	80% of existing matrix accredited organisation reapply for assessment by their due date.



# Key Performance Indicators

<b>KPI 6</b> To market and promote the standard to organisation and increase its future use.	Number of new contacts generated per year.
<b>KPI 7</b> Continuous Improvement Checks (CIC) 1 and 2, are completed within the 4 weeks of their due date	85% of CICs completed within 4 weeks of their due date
<b>KPI 8</b> Develop new case studies which show the benefits of the matrix standard	Three new case studies per year
<b>KPI 9</b> To provide monthly Management information.	Within 10 working days of the end of the reported month.
<b>KPI 10</b> Provide an annual written report which reviews the performance of the assessment body and demonstrates that it is self-sustaining and projects future growth	One month from the end of the contracting year.





# TUPE

- ☐ TUPE may apply to this procurement, subject to the specific circumstances of each Tender.
- ☐ However, Tenderers will need to make their own assessment of whether, and if so, to what extent, TUPE will apply.
- ☐ Tenderers must set out their proposals for managing the TUPE process throughout the transition of the Services and its impact.
- ☐ We are unable to give any indication of the number of employees who may transfer if TUPE applies to this procurement.



# High-level Indicative Procurement Timetable

Publication of the invitation to tender on Contracts finder	1 July 2024
Closing date for bids to be submitted via the Jagger procurement portal: <a href="https://education.app.jagger.com/">https://education.app.jagger.com/</a>	26 July 2024
Bid evaluation & Internal governance	7 August to 16 September 2024
Standstill Period	18 to 30 September 2024
Contract award	1 October 2024
Implementation and transition to new contract	1 October 2024 to 10 January 2025
Commence service delivery	11 January 2025

Please note that this is an indicative timeline and the DfE reserves the right to amend the timetable at any stage of the process.  
The DfE reserves the right not to enter a formal process and not award a concession contract.



# What we would like to know

- ☐ Are there any limitations or opportunities with the proposed approach?
- ☐ What are the potential risks and issues that we need to consider in the procurement?
- ☐ What additional information would you require in order to respond effectively and deliver a quality bid
- ☐ Any other comments you might wish to make?

If you have any further questions, please submit them by email to: [commercialdelivery.skills@education.gov.uk](mailto:commercialdelivery.skills@education.gov.uk) by 4 June 2024. All questions will be anonymised and sent to all attendees of the market engagement event by the 11<sup>th</sup> June 2024 and added as an attachment to the Contracts Finder PIN.

