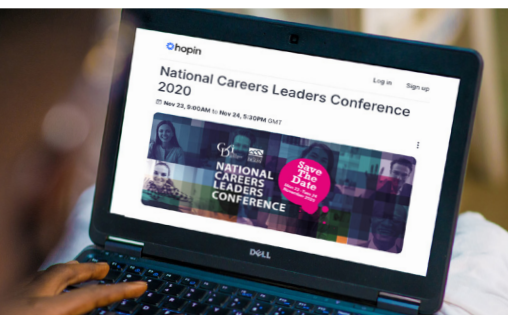




# Annual Report 2020-21

AGM – Friday 10 December 2021



# Contents

---

<b>Introduction</b>	<b>02</b>
<b>Financial Overview</b>	<b>03</b>
<b>Memberships and Services</b>	<b>04</b>
<b>Professional Development</b>	<b>07</b>
<b>Training and Events</b>	<b>09</b>
<b>Championing the profession</b>	<b>11</b>
<b>CDI Organisation</b>	<b>11</b>
<b>Summary</b>	<b>12</b>

---

# Introduction

This report provides an overview of the CDI's activities for our eighth year of operation from April 2020 to March 2021. It was a challenging year as the global pandemic necessitated rapid change, to which the CDI responded positively and maintained its delivery for members. This is a testament to the work of the CDI team, Board, Associates, volunteers and everyone we work with.

2020-21 was Jan Ellis's last year in the role as Chief Executive, having steered the CDI since its formation. This report was prepared after Jan left the CDI and we are very grateful for her many years of leadership and championing of the sector. Jan increased the CDI's membership, financial stability, impact and reputation across the career development sector.

The CDI has two core roles - to support its members and to champion the career development sector. To do this effectively it needs to represent members from across the profession, act as the guardian of ethics and standards and build effective relationships with government and stakeholders. Through all these activities, the organisation retains a clear focus on the end goal - to maximise the benefit careers development can bring to individuals, the economy and society.

This report outlines the key activities, achievements and challenges facing the CDI during the financial year. The impact of the COVID-19 pandemic created an exceptional set of circumstances and the CDI had to pivot its business model to quickly embrace home working and digital delivery, requiring a huge and sustained effort across the team, who responded fantastically. The CDI's response is summarised below as well as referenced throughout this report.



Threat	Measures	Impact
Staff unable to work in the office during lockdown.	Moved to homeworking.	Team largely able to work effectively with limited disruption to organisation performance.
Team wellbeing – from remote working and risks of infection.	Frequent virtual team and 1:1 meetings to keep in touch. As we returned to the office, took measures to reduce infection risk.	Some impact on wellbeing but greater communication raised awareness of concerns so they could be addressed.
Loss of face-to-face training – from expert masterclasses to Academy training.	Moved training to Zoom. Ramped up free CPD webinars to add value during lockdown.	Some cost and effort to use Zoom but enabled training programme to go ahead. Audience engaged well with the online provision.
Loss of face-to-face conferences.	Subscribed to HopIn virtual conference platform, trained team supported by Digital Associate. Adapted conference formats to online.	Largely maintained conference program online. Added TechFest online conference. Income and costs both reduced.
Difficult for QCD students to meet placement requirements.	Revised placement requirements to enable progress despite lockdown restrictions.	Students managed to progress and still gain valuable experience.
Unable to run CEC Careers Leaders training face-to-face.	With CEC agreement, moved the training to online provision.	Training delivered successfully, contractual obligations met and retained positive learner feedback.
Members struggle to adapt to digital working with clients and colleagues.	New fortnightly newsletter and COVID resources on the CDI website to support and upskill members, including papers on managing the impact of COVID-19 and using videoconferencing with clients.	While not all members are fully comfortable with online provision, our support helped many members adapt more quickly and easily to online support.

# Financial Overview

Financially 2020-21 was a positive year for the CDI. While income remained flat as the pandemic restricted opportunities for growth, the lower cost of online activities enabled the organisation to reduce costs. This resulted in a healthy surplus that allowed us to achieve our target level of reserves (of £260k), ensuring we could continue operating for at least three months should we experience a sudden shortfall in income.

As all our surplus is reinvested in the organisation, 2020-21 has expanded our funds for future development of member services and to champion the profession. This investment will be driven by the 2025 strategy that was in development towards the end of the financial year, and due for launch at the installation of Carolyn Parry as the new CDI President on 10th December 2021.



Year	Income	Expenditure	Surplus
2018-19	£752,238	£717,044	£35,194
2019-20	£961,629	£915,601	£46,028
2020-21	£964,116	£817,474	£146,642

Our three main income areas are:

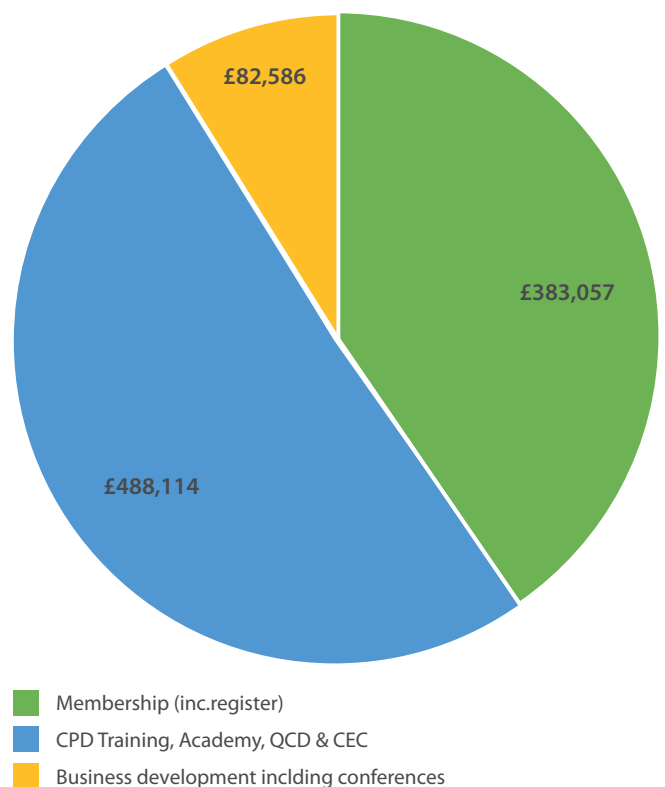
- Membership fees including the Register
- CPD training and events including CDI Academy, QCD and CEC contract
- Business development activities, including advertising, sponsorship, conference sales, the jobs board, etc.

Costs have been tightly managed with some natural reductions due to the pandemic (such as lower travel and expenses claims) and identifying opportunities to keep costs low in the face of uncertainty.

Maintaining our income in 2020-21 reflects the team’s success in rapidly moving to an online offer, though some areas, such as conference income, were still affected. However, while ticket prices of virtual events were lower, this also reflected the lower cost of delivering online events, hence the positive impact on surplus.

This was the second year that the CDI delivered the Careers & Enterprise Company (CEC) contract for Career Leader training. Volumes were again very strong and the switch to virtual delivery has been a success. This contract is a key part of our income and the very positive candidate feedback should enable us to continue to generate income and enhance our reputation with future contracts.

2020-21 Income distribution





# Memberships and Services

At the end of March 2021, the CDI had over 4,770 individual and affiliate members. Membership income, including Registered Professionals for 2020-21 was £383k

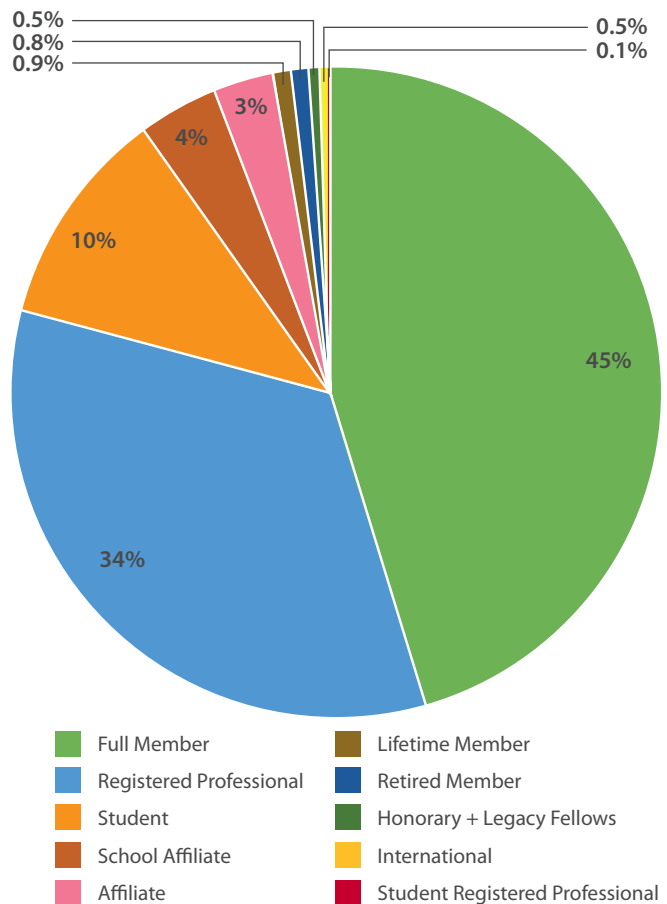
Our aim is to provide a comprehensive range of benefits to attract members from across the profession, whatever the stage of their career.

The total number of members increased slightly during the year, showing that we were able to attract new members even as the churn rate increased. This was despite some traditional recruitment activities being affected by the pandemic, such as the National Career Guidance Shows.

One of the challenges, highlighted in last year's report, is that some members are used to employers paying for their memberships, so they are likely to lapse if the employer decides to no longer fund them. This is a challenge and we continue to promote the benefits to persuade people to retain their membership where this should occur.

Membership fees last increased in January 2016 and offer good value for the benefits received. To help members struggling to afford their membership fees, we introduced a £10 per month pay-as-you-go direct debit option. In April 2020 we also extended the time to pay to three months after the renewal date.

Membership Types 2020-21



## Member communications

We communicate with current and prospective members through a number of key channels, raising awareness of the benefits available to them as a CDI member, updating on news in the sector and sharing progress on the activities of the CDI in championing the sector.



## Career Matters

There are four issues of the CDI's flagship magazine each year, with the cost of editing, print and postage covered to a large degree by advertising income. While we will offer a printed copy of the magazine ongoing, the June 2020 edition was provided in digital format only, as members worked from home and may not have received the paper copy for some time.

## CDI website

The website is one of our major communication tools. The website had 908,465 page views in 2020-21, up nearly 24% on the previous year, with an 18% increase in users. The three most popular pages are:

1. Home page
2. Webinar calendar
3. Training and events page

In 2020-21 two key improvements were made to the website. The new events module was implemented, improving the booking journey. Improvements to the members area increased the visibility of key membership information (such as renewal date and membership number) and provided immediate access to a range of membership benefits (such as Career Matters and the CPD recording suite), as well as providing clear access to the Professional Register and key CDI News stories.

## News by Email

This fortnightly round-up of news across the sector is sent to all members, with editions for England, Scotland and Wales. It

also presents an opportunity for the CDI to act as a collator of industry news, with many organisations now regularly sending notices and updates to the Chief Executive for inclusion.

## Member networking

A primary role of the CDI is to encourage and facilitate networking between members, which we achieve through regional meetings, LinkedIn groups, specialist Communities of Interest and Communities of Practice. At the December 2019 AGM it was agreed that the Regional Representatives would form the CDI Council, along with the key officers of the Institute. However, with the pandemic restricting activities and the need to focus on rapidly adjusting our services, this change will be actioned next financial year.

## Social media

We continued to increase our use of social media channels and the CDI social media groups (on Facebook, LinkedIn and in the members area of the website) are increasingly engaged communities where members can get peer support and gives the CDI another route to keep members updated.

In May 2020 we launched the Community of Practice for Career Development Professionals – a moderated Facebook group for all CDI members which grew quickly during the lockdown period, with members very active in seeking peer support and sharing information.



## Careers in Careers Jobs Board

The statistics below evidence that the number of advertised jobs in the sector is increasing and more job seekers are using the board to find careers related roles. The average number of job views (number of times jobs have been clicked on) is in the region of 11,100 per month, following a significant increase in the summer of 2020 as we came out of the first lockdown.

Job board income: In 2020-21 we achieved £27,498 versus £18,494 in 2019-20, an increase of 49%.

	2018-19	2019-20	2020-21
Number of job vacancies advertised	175	182	230
Job views	42,125	84,362	134,126
Registered employers	278	336	445
Registered job seekers signed up to the site	1837	2269	2622



# Professional Development

It has always been important for the CDI to support members as they train to enter the profession and enhance their skills and knowledge through CPD. To maintain this during the pandemic and lockdowns, we had to rapidly switch to virtual delivery for all training, with additional online resources to support our members through such challenging times.

This was a steep learning curve and the CDI team, Training Associates, Assessors and Internal Quality Assurers worked extremely hard to convert the training materials and support each other as they learned how best to deliver online training. Members rose to the challenge of writing briefing and position papers to help those working in the sector. As face-to-face delivery became possible again, many members, candidates and students still prefer virtual delivery and we aim to offer a mix of delivery approaches in the future.

## Qualification in Career Development (QCD)

The seven universities delivering the QCD to 128 students faced the same challenges. Following discussion between the universities, the CDI's Professional Development Manager (PDM) and QCD Moderators it was agreed to reduce some of the QCD Professional Report requirements due to the fact that the number of assessed interviews, group work and placement days would be impossible to achieve during lockdown. In reality students delivered work online, adding to their knowledge and skills for online delivery. Many also managed to virtually attend a wider range of placements, adding to their understanding of the breadth of the sector.

Moderation of QCD Professional Reports, centre visits, Moderators' and QCD Leaders' Meetings all took place online. The centre visits by the PDM were replaced by recorded

webinars on CDI Membership Benefits and the Requirements of the QCD. Two recorded webinars on 'Finding a Job in the Career Development Sector' and 'Professional Networking' were well received.

The Student Conference in April 2020 was quickly converted into an online conference and in early 2021 two further online Student Conferences were delivered. Both conferences attracted over 100 delegates which was more than previous face-to-face attendance.

## The CDI Academy

Course attendance in 2020-21 was affected by the pandemic. We delivered the following courses online, with the number of candidates in brackets:

- Level 6 Diploma in Career Guidance and Development (28 of whom 10 are still completing);
- CDI Certificate in Careers Leadership (21);
- CDI Certificate: Careers Assistants (5);
- CDI Certificate: Career Coaches (7) and
- Revitalise your Skills and Knowledge (5).

We had two successful External Quality Assurance visits during this time, leading to being awarded Direct Claims Status for the Level 6 Diploma in Career Guidance and Development.

## Career Leader Training funded by the Careers & Enterprise Company

The original contract with the C&EC (October 2018) was to deliver the training to 90 Careers Leaders in London, South East and South West. The contract was increased to 258 accredited learners and 131 non-accredited learners, across 38 cohorts and 190 training days. In April 2020, due to lockdown we quickly converted to online delivery with additional trainer and assessor support for learners to deliver the remaining 42 training days. In October 2020 we started delivery of a new C&EC contract to 152 learners in 16 cohorts all of whom will complete by October 2021.





## CPD Resources

To provide additional support to our members during such challenging times the PDM wrote a series of fortnightly newsletters focusing on updating skills and knowledge through online CPD; an A-M of CDI CPD opportunities and an N-Z of CPD opportunities; reflection on practice and CV enhancement through the skills and self-knowledge developed during lockdown.



Claire Nix and Anthony Barnes produced a *CDI Briefing Paper on Careers Advisers and Careers Leaders in the 21st Century: Managing the Challenges of Covid-19*. Michael Larbalestier, Project Associate (Digital Learning), produced a *CDI Position Paper on Safe and ethical use of web videoconferencing for personal careers guidance*. In response to requests from members, Liz Reece produced a *CDI Briefing Paper on Career Action Planning*.

We also introduced a page on our home page covering Covid-19 Research and Reports and more detailed LMI information was made available in the members' CPD Resources section.

The CPD Monthly Newsletter produced by Dr Lyn Barham continued to be well received and included newsletters on: Digital working; Mental wellbeing - ourselves and our clients; Career theories - a focus on recent developments; Labour markets in the Covid-19 era and Work and wellbeing.

## CDI Blueprint of Learning Outcomes for Professional Roles in the Career Development Sector

Working with QCD Leaders and PSC Members, the PDM updated this document to fully reflect the changes in the sector since 2016. It was published in March 2021 alongside a one-page summary which career development professionals can use to explain qualification requirements and the breadth and depth of the role to colleagues, employers and clients.

## Mentoring Service

This service for 25 Mentees ran from September 2020 until March 2021. The evaluation showed how much this support was appreciated and we intend to run the scheme again in 2022.

## Supervision Guidance

During 2020, members of the Professional Standards Committee discussed the need for and content of guidance on supervision. *The CDI Guidance on the Benefits and Delivery of Supervision in the Career Development Sector* was written by John Walker and Rachel Mallows with support from the PDM and published in March 2021. Webinars to support the Guidance will take place in May 2021 followed by expert masterclasses in the Autumn.

## UK Register of Career Development Professionals

At the end of March 2021, the number of people on the Register was 1568. Of these, 627 have a register profile advertising the career development services they offer. Interest in joining the Register is steadily increasing thanks in part to the CDI lobbying the Government in England on the increased need for personal career guidance to help the economy recover and our relaunch of the Register in January 2021. The Register now has two sections: Registered Career Development Professional and Registered Careers Leader.

## Professional Standards Committee

The CDI's professional development work is supported by the Professional Standards Committee (PSC). An overview of the PSC's work over the year will be presented in a report by the Chair of PSC, Avril Hannon, and we'd like to thank the committee for all their hard work and support over the year.



# Training and Events

The CDI offers a diverse programme of high-quality CPD, from one-hour free webinars to expert masterclasses and conferences. While the CDI strives to offer many events for free or at discounted rates as a membership benefit, the events programme also generates valuable income for the CDI.

<b>Income from events 2018-19</b>
£101,466*
<b>Income from events 2019-20</b>
£116,712**
<b>Income from events 2020-21</b>
£82,806*

\* Includes National Careers Leaders Conference  
 \*\*Includes the biennial National Conference (December 2019) and National Careers Leaders Conference

While events income was significantly more challenging in 2020-21 due to the pandemic, it was only marginally lower than 2019-20 income once the National Conference is taken into account (£32k in 2019-20). As costs also fell due to the use of virtual delivery, we were able to maintain surplus while keeping prices low.

## Webinars

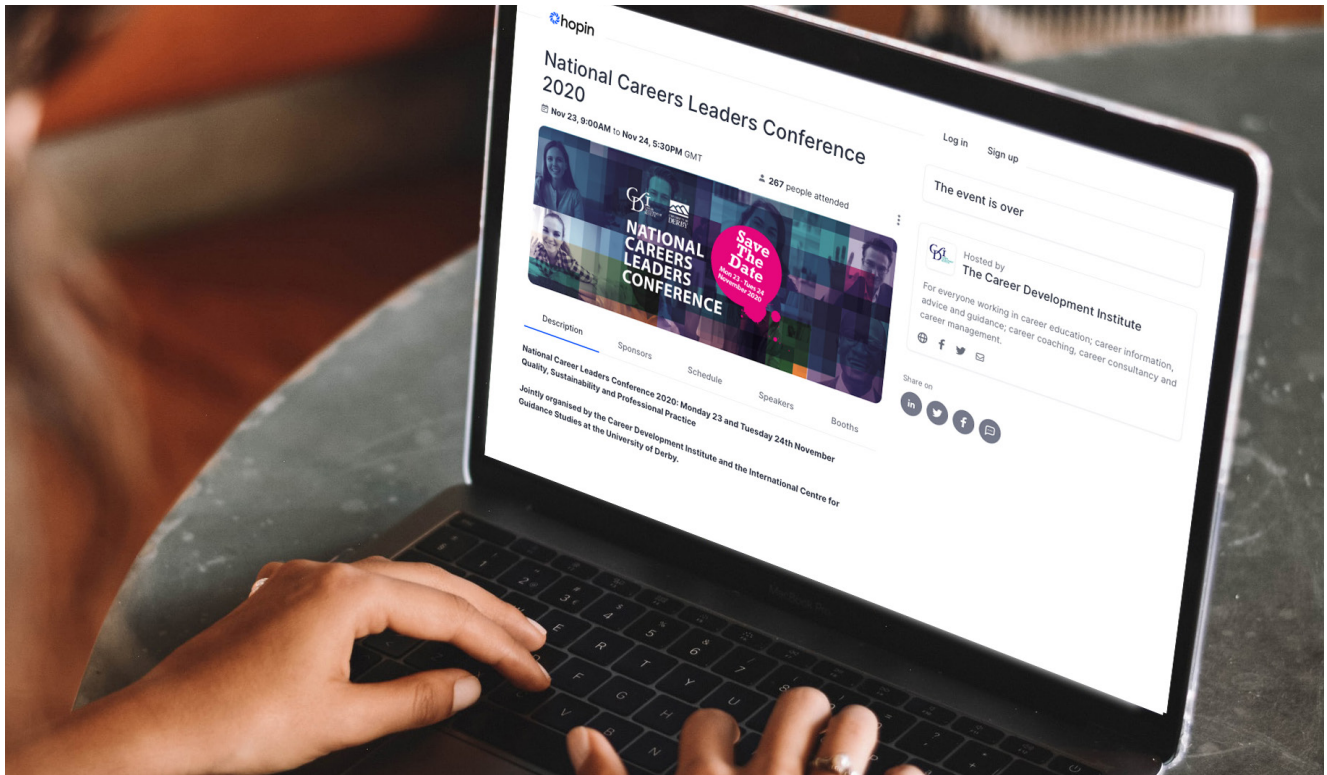
To increase the benefits to members during lockdown, in April and May 2020 we extended our programme of free webinars and moved the paid expert masterclasses online. In addition to taking part in webinars, members can also access the recordings through the Members' Area of the website.

We are, as always, very grateful to all our webinar presenters who give their time free of charge.

<b>2018-19</b>
38 webinars
1,064 delegates
<b>2019-20</b>
35 webinars
1,235 delegates
<b>2019-20</b>
84 webinars
4,505 delegates

As a result of lockdown, we saw big increases in attendance for the webinars, with 4,505 delegates attending 84 webinars and we increased our webinar capacity to up to 500 attendees.





## CPD programme in Scotland and Wales

Our Project Associates in Wales and Scotland lead on establishing member-focused CPD programmes in their home nations. In 2020-21, these programmes continued the provision of webinars in Wales and virtual member meetings in Scotland.

## NICEC/CDI events

We offered two free 'Cutting Edge – Research into Practice' CPD days for members, in conjunction with NICEC. These offer innovative and practical programmes by experts, as well as great opportunities to network.

## National Conference for Careers Leaders

Working with iCeGS at the University of Derby, in November 2020 we ran the third, two-day national conference for Careers Leaders, focused on *Quality, Sustainability and Professional Practice*. The conference helped practitioners explore the key themes through the lens of the COVID19 pandemic and to make plans for the new normal. As an online event, we had 264 delegates registering for the event, compared to 70 at the previous year's in-person event.

## National Research Conference

The National Research Conference took place on 24th and 25th February 2021 on the HopIn virtual platform. The focus was on the latest in evidence and practitioner research in career development and featured both a UK and an international panel. Workshop sessions included: quantitative data analysis, constructing online surveys and reviewing literature. The event attracted 247 registrations, up from 60 for the previous in-person event.

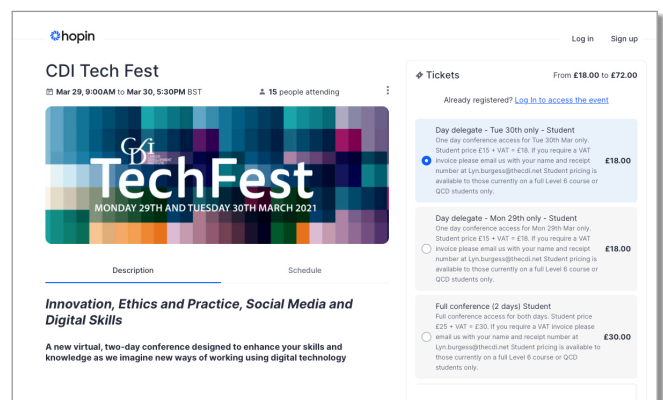
## The UK Career Development Awards (UKCDA)

The UKCDA were presented over the week commencing 8th March 2021, as three virtual presentations each covering three awards, including the NICEC Bill Law Award. While we would prefer the awards to have been in person, the events

were considered a success with keynote talks from Dr Deirdre Hughes, Gillian Keegan MP and CDI President Dave Cordle. The Rodney Cox Lifetime Achievement Award was presented to Heather Jackson.

## Fellowships

Led by the Professional Standards Committee and confirmed by the Board, CDI Fellowships recognise and honour the commitment of eminent members who have contributed to both the development of the CDI and the career development profession. In March 2021 we awarded Fellowships to Claire Nix, Liane Hambly and Lyn Barham. The Fellowships were presented at the UK Career Development Awards.



## TechFest

As part of the CDI's digital strategy, we ran a two-day virtual conference on 29-30 March 2021 exploring the future of digital in career development practice. Talks covered a wide range of digital-related topics, such as the use of Artificial Intelligence in careers support, using social media as a careers practitioner, an overview of digital T-Levels and how to create a virtual careers event. As a one-off event, TechFest attracted 252 attendees and engaged a good number of commercial partners.



# Championing the profession

Building partnerships and campaigning on behalf of members and the sector are important aspects of the CDI's work. Updates on our activities in this area are shared with members at key meetings, through News by Email, press releases, direct emails and the Career Matters magazine.



The CDI actively builds links with civil servants and government agencies and in 2020-21, we met regularly with civil servants in the DfE Careers Unit, leadership within the Careers & Enterprise Company, Skills Development Scotland and Careers Wales. The Chief Executive sits on key advisory and steering groups including the Board of the Quality in Careers Standard, DfE T-Levels Stakeholder Advisory Implementation Group, and the CEC's Personal Guidance Steering Group. The Chief Executive also joined the Board of Careers England, building links with NCS providers, and the Youth Employment Group, set up in response to the COVID-19 impacts on young people.

## **CDPG** Career Development Policy Group

The CDI is also part of a new informal group of UK careers organisations – the Career Development Policy Group (CDPG) - formed to coordinate

careers policy responses in light of the pandemic. In July 2020 the group wrote an open letter to the Prime Minister and Secretary of State for Education, Gavin Williamson, requesting a Career Guidance Guarantee. This was followed by a briefing on career guidance in relation to the Plan for Jobs, and an open letter to Gillian Keegan MP, Minister for Apprenticeships and Skills. In March 2021 the CDPG also hosted The Great Debate – an online discussion about the importance of career development during such challenging times.

Other briefings and letters included:

- Briefing for all political parties ahead of the May 2021 Scottish elections.
- Briefing paper on the Skills for Jobs white paper.
- Responses to government consultations including reviews of Level 2 and Level 3 qualifications and the Workforce of the Future inquiry.

# CDI Organisation

The CDI continues to deliver a huge amount of value for members and promotion for the sector with a small employed team, supplemented with a number of Associates and our many fantastic volunteers. While it is good for the organisation to be lean, our current size does place limits on the breadth and scale of our activities.

In 2020-21, we saw the following team changes;

- In August 2020 Lyn Burgess changed role within the CDI, filling a vacancy in finance to administer credit control. In that role she has successfully encouraged members to renew and reduced membership fee debt.

We also took on/stopped the following Associate roles;

- Having appointed a Project Associate (Digital Learning) at the end of March 2020, we made progress on implementing the digital strategy. As well as running a series of 'Digital Bytes' webinars and developing the CTRL digital skills assessment tool, this role was key in selecting and utilising the HopIn virtual conference platform as well as supporting online conferences.
- To provide support for the Professional Development Manager and CDI Academy Manager, a part-time Project Associate (Professional Development) was engaged, to handle incoming queries regarding the CDI qualifications and courses. As well as providing information, this service was valuable in reassuring people considering a significant change in career.

The Board, with the support of Jan Ellis, undertook a recruitment campaign for a new Chief Executive, following Jan's decision to step down. Unfortunately, the recruitment process took longer than planned but by the end of the financial year, the Board had secured a new Chief Executive to start on 12 April 2021. The Board were very grateful to Jan Ellis for agreeing to delay her departure until the new Chief Executive was in post and a full handover could be completed.





## Summary

This report outlines our achievements in our eighth year, despite the extreme challenges faced by the organisation due to the impact of the pandemic.

Through the hard work and dedication of the team, supported by the Board, Associates, volunteers, partners and members, we have continued to deliver against our two broad purposes; supporting our members and championing the career development profession.

Our response to the pandemic, in particular moving quickly to the online provision of many services, was well received by the membership. This resulted in neutral income impacts and in some areas an increase of the services available. Certainly, moving conferences and training online has made them accessible to more members.

While we feel there is still under-investment in personal careers guidance for young people and adults, in 2020-21 we achieved some steps in improving this, and by collaborating with others as part of the CDPG we are building our capability to raise the profile of the profession further.

Financially the CDI is in good health, with a positive reserves position and a growing investment pot to support the developing 2025 strategy. The continuation of the CEC contract is a key addition to our income and we will strive to maintain that going forward.

2020-21 has been a year of significant change, with the response to the pandemic affecting all areas of the sector, our members' practice and the CDI's operations. Through the immense effort and dedication of everyone involved, we have reached the end of a challenging year in a good position.

As we look forward, we have another year of change, with Jan Ellis leaving and handing on the Chief Executive role to me. I would like to thank Jan, the team, Board, PSC, Regional Reps, Associates, volunteers and partners for all their work in 2020-21 and I look forward to reporting similar success at the end of my first year in the role.

A handwritten signature in black ink, appearing to read 'David Morgan', written over a light blue background.

David Morgan

Chief Executive



Ground Floor,  
Copthall House,  
1 New Road,  
Stourbridge,  
West Midlands  
DY8 1PH

Tel: 01384 376464  
Email: [hq@thecdi.net](mailto:hq@thecdi.net)  
[www.thecdi.net](http://www.thecdi.net)

Copyright © Career Development Institute November 2021

