

An Evaluation of the Ufl/learndirect Telephone Guidance Trial

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Contents

Executive Summary	vii
Method	vii
Generating demand	vii
Meeting demand	viii
Cost-effectiveness	xi
Conclusions	xi
1 Introduction	1
1.1 Policy context	1
1.2 The guidance trial	1
1.3 Existing adult guidance services	2
1.4 Definitions	3
1.5 Aims of the evaluation	4
1.6 Objectives	4
1.7 Structure of the report	4
2 Methodology	6
2.1 Literature review	6
2.2 Context interviews	6
2.3 Interviews with LLAs	6
2.4 Analysis of a sample of calls	7
2.5 Interviews with nextstep	9
2.6 Caller survey	9
2.7 Analysis of management information	9
2.8 Analysis of financial information	10
3 Generating Demand	11
3.1 Summary	11
3.2 Marketing the service	11
3.3 The volume of calls	15
3.4 The nature of demand	21
4 Meeting Demand	25
4.1 Summary	25
4.2 Feasibility of telephone guidance	26
4.3 Capacity to meet demand	32
4.4 What did callers receive?	38
4.5 User satisfaction	48

4.6	Quality assessment	53
5	The Outcomes of Guidance	59
5.1	Summary	59
5.2	Measuring the outcomes of guidance	59
5.3	Changes in employment status	61
5.4	Self-reported outcomes	62
5.5	Summary of outcomes	72
6	Cost-effectiveness Analysis	73
6.1	Summary	73
6.2	Exploring the cost-effectiveness of telephone guidance	74
6.3	Discrete alternatives or complementary services?	74
6.4	Cost-effectiveness of the guidance trial	77
6.5	Presentation of cost-effectiveness indicators	80
6.6	Is learndirect cost-effective?	83
7	Conclusions	86
7.1	Is there demand for the LLA service?	86
7.2	Has learndirect got the capacity to meet demand?	86
7.3	Is telephone guidance feasible?	87
7.4	How cost-effective is telephone guidance?	87
7.5	Are users satisfied with the service?	88
7.6	What are the short-term outcomes of the service?	88
7.7	Opportunities for development	88
7.8	Issues for further examination	90
	List of References	91
	Sources used to inform the quality assessment framework	92
	Annexes	94
	Annex A – Call recording sample profile	94
	Annex B – Caller survey sample profile	96
	Annex C – Quality assessment	97
	Annex D – Respondent profiles for learndirect and nextstep client surveys	98
	Annex E – NICEC learndirect Guidance Assessment Framework	100

Executive Summary

In 2005 the government established a review of Information, Advice and Guidance services for adults in order to help achieve the long-term objective outlined in the White Paper, *Skills: Getting on in Business, Getting on in Work* (2005). This called for a universally available, high quality and well-used service offering linked information, advice and guidance for adults covering jobs, qualifications, training and related support such as childcare. One element of the review was to conduct and evaluate a trial extension of the Ufi/**learndirect** telephone guidance service to handle a substantially larger volume of calls, and to test a three-stage call-back and action planning model.

This evaluation of the **learndirect** guidance trial aims to assess:

- how successful the trial has been in generating and meeting demand for telephone guidance
- the feasibility of delivering guidance by telephone
- how far short-term positive outcomes of guidance are achieved
- the cost-effectiveness of telephone guidance compared to face-to-face services.

Method

The evaluation draws on the findings from a number of research strands including a scored quality analysis of 100 calls to the service, a survey of 1,000 service users, interviews with **learndirect** advisors, and an analysis of management and financial information. Management information was available from January-July 2006 and the financial analysis focuses on the time period April-June 2006 to try to minimise the effects of set-up costs for **learndirect**.

Generating demand

There is demand for telephone guidance

Between January and July 2006 there were over 46,000 calls to the **learndirect** guidance service, approximately 14,000 of which involved action planning. There is scope for further demand as there are an estimated five million people of working age

qualified to Level 2, a proportion of which are likely to want to qualify to Level 3. There is also demand for guidance outside the remit of the trial, for example from individuals qualified to Level 4. While there is some seasonality in demand, overall the trend has been upward.

The trial is generating and meeting demand from its target groups of women returners and those wishing to qualify to Level 3. **learndirect** has reached clients new to guidance (75 per cent of users had not used careers guidance since leaving school), and is servicing a different client group to nextstep. Telephone is the preferred medium via which to receive guidance for 42 per cent of users. The convenience and accessibility of the guidance service was valued by callers, although two-thirds of calls were taken between 10am and 4pm.

Demand for nextstep unaffected

Prior to the trial there were a small number of referrals to nextstep from **learndirect**. Although the number of referrals from **learndirect** has decreased, overall demand for face-to-face services has been unaffected and there is little evidence of **learndirect** diverting demand from face-to-face services.

Demand low amongst older people

The trial has not attracted representative proportions of callers aged over 50. This is also true of face-to-face services, although nextstep services have a larger proportion of clients in this age group. The over 50s were significantly less likely than other callers to report that **learndirect** guidance helped them to make an informed decision about their career, although calls with callers in this age group did score 'good' and 'excellent'. External factors, barriers to learning, or labour market outcomes may affect older service users' reflections and overall satisfaction with their situation, rather than being a reflection on the service per se, but this finding needs further exploration.

Meeting demand

As good as the best face-to-face practice

learndirect telephone guidance can be, and is in many instances, as good as the best face-to-face practice. Fifty-two per cent of a sample of calls were graded 'good' or 'excellent' and only nine per cent scored as flawed or poor. Given that the trial is still in its early stages this result is encouraging. Nevertheless, there are some areas for staff development or minor changes to procedures that could increase the proportion of good and excellent calls. The quality analysis indicates that scores are not likely to be more or less good for particular types of caller. This suggests that the service is able to meet demand from a range of client groups.

Advisors progress within **learndirect**

Recruitment has largely been via internal promotion because of the specialist skills mix required for the Lifelong Learning Advisor (LLA) role of both advice giving and telephone skills. There has been sufficient internal capacity to meet demand for the trial, although advisors reported being very busy and initially the scale of demand

meant that advisors felt they did not have time for structured reflection about their practice.

Professional development

LLAs have a programme of continuous professional development and access to relevant qualifications, including at a post-graduate level. This is important not only for the **learnirect** service, but for the profession more widely. Guidance for adults has typically been fragmented and short-term funded, and in **learnirect** can be planned and sustained.

Sufficient local information

From the sample of calls reviewed in depth, local level information and advice needs appear to be being met by the service, although callers are less satisfied with this aspect of the service compared with other elements. There may be instances where, for example, nextstep can deliver this aspect more thoroughly. However, this does not compromise the quality of the **learnirect** guidance service overall.

Large range of resources

The advisors have a large range of resources to draw upon. Labour market information is generally felt by advisors to be difficult to apply to telephone guidance in practical terms. Advisors valued sector-specific workshops to deepen knowledge about particular industries and occupations, and feedback from the caller survey suggests that callers want and expect industry specific information.

Further collaboration between Sector Skills Councils and **learnirect** could increase advisors' knowledge of specific sectors.

Reliance on IT

Computers, the internet and email are often used to engage with callers. While this is a strength of the service, allowing callers to access a range of supplementary material, for some without access to a computer or IT skills this can be a barrier to using the service effectively. Advisors check whether a caller has access to a computer but did not always ask whether they have the skills to be able to use it. Older adults are more likely to lack IT skills and this might affect demand amongst this group.

Increasing confidence in working with challenging clients

The guidance trial has attracted a range of client groups. There are some challenging callers for whom face-to-face support may be more appropriate. These include individuals for whom English is a second language and callers with mental health problems. As advisors gained more experience throughout the lifetime of the trial they seem to have become more confident in working with challenging client groups.

Action plans are beneficial

Of those callers who reported that they had agreed an action plan, (90 per cent) the vast majority felt there had been one or more benefits in doing so. The action plan was

a key factor in explaining the satisfaction with the service, whether a caller would use the service again and whether they would recommend it to a friend. Callers who recognised developing an action plan were more likely to report positive outcomes.

However, it is not clear why over half of respondents (56 per cent) did not recognise that they had developed an action plan. It could be because of a delivery fault, for example a posted copy of an action plan might not have been offered or an email address might have been noted incorrectly. Alternatively, there may be difficulties due to the variety of ways in which advisors describe the action plan to callers. Given its association with positive outcomes, procedures could be changed to ensure that advisors explain the purpose and benefits of an action plan at the end of a call to try to increase awareness and recognition of its importance.

User satisfaction high

User satisfaction is high, with 86 per cent agreeing that the overall quality of the service was good. BMG's more recent customer satisfaction research appears to indicate that caller satisfaction has increased over the lifetime of the trial.

Three-stage model not always used

The three-stage model of an initial guidance session and two follow-up calls has not been used by the majority of callers, although management information is not available to assess whether this is because call-backs are not demanded or because appointment times are not being kept.

Use of the three-stage model has differed from what was originally envisaged, although there are groups more likely to have used the three-stage model, such as those currently inactive. **learndirect** has adapted and focused on other areas of the service appropriately. In many cases the follow-up calls should not be regarded as second guidance interviews, although some will develop as such. More often they are simply a check on clients' satisfaction and progress with the action plan.

There is potential for call-backs to be second guidance sessions more frequently. Those callers who have had more contact with the service and recognise that they have an action plan are more likely to report outcomes, suggesting an association between the intensity of the intervention and positivity of the outcomes.

Caller outcomes

Callers to **learndirect** attributed a range of work, learning and soft outcomes to their call(s). Nearly one-fifth (19 per cent) of respondents to the caller survey had gained employment at some stage between the time of their first call to **learndirect** and the time of the survey. Thirty per cent of respondents reported that they had either taken part in a training course, enrolled on a training course or were working towards a qualification since their call.

Work-related outcomes were less likely to be attributed to the guidance service than learning outcomes. This may be because there are other incentives or motivations to find work. Soft outcomes were more likely to be attributed to **learndirect** than hard outcomes. The reported soft outcomes included attitudinal change towards work and learning, awareness of training and work opportunities, and building capacity to find relevant information and advice in the future.

Some respondents had future plans to undertake actions. This suggests that the reported outcomes are a snapshot and at the time of the survey many callers were part way through making changes.

Influencing callers

Overall, 52 per cent of callers indicated that **learndirect** had been a significant or quite a big influence in helping them to make decisions about their career. This proportion was higher for people recognising that they had developed an action plan than those who did not (64 per cent compared to 46 per cent), which again highlights the importance that developing and acknowledging an action plan can have.

Cost-effectiveness

learndirect is cost-effective

There have been difficulties trying to obtain comparable costs for face-to-face services (ie nextstep) and telephone services (ie **learndirect**). When using financial and management information about service use from April-June 2006 cost per 'guidance' session is approximately the same for **learndirect** guidance as it is for nextstep advice and enhanced services.

The impact of marketing spend is significant and without this spend (ie just including the cost of delivery rather than the cost of generating demand) **learndirect** is equally or more cost-effective than nextstep by each measure of examined cost-effectiveness.

The trial period includes set-up costs, for example staff training and recruitment, systems and telephony set-up, and generating brand awareness. These costs are all included in the cost-effectiveness analysis and will become less significant as a proportion of overall expenditure over time, increasing cost-effectiveness.

Conclusions

There has been a demand for telephone guidance and this is likely to continue as **learndirect** has only worked with a small proportion of the overall population in the target groups. The three-stage call-back model has not been used by the majority of callers, although individuals who report a greater number of calls to the service and recognise that they have developed an action plan are more likely to report outcomes. This suggests an association between the intensity of the intervention and likelihood of outcomes.

learndirect has capacity to deliver guidance and the number of LLAs has been expanded throughout the lifetime of the trial. Although demand for the service has increased slightly, the number of advisors has increased slightly faster.

Overall telephone guidance appears to be appropriate and feasible for the majority of callers, with many reporting both hard and soft outcomes. Nevertheless there are some groups of callers for whom it appears to be less so, such as callers who lack access to a computer and the skills to use it effectively, and callers with English as a second language. Overall, users are satisfied with the service.

The cost-effectiveness of **learndirect** compared to nextstep depends on the costs that are included in the calculation. On the basis of the available data nextstep advice and **learndirect** guidance are broadly similar in terms of cost per 'guidance' session.

An assessment of a sample of calls suggests that **learndirect** is well-placed to meet demand for telephone guidance, and that at its best the service is as good as the best face-to-face practice. However, there are some areas where the service could be strengthened.

The quality of calls could be improved with slight changes to procedure, for example between the IA and LLA handover, and with staff development. Data collection should include whether or not a client is eligible for an action plan; this would enable measurement of the proportion of eligible callers who do not opt for the action plan service. Data on whether call-backs are completed should also be collected.

Overall, the telephone guidance trial has shown there is demand for telephone guidance, that telephone guidance is feasible on a large scale, can be provided cost-effectively, and that service users are satisfied and experience a range of positive outcomes.

1 Introduction

1.1 Policy context

The University for Industry (Ufi) was established in 1998 to encourage wider participation in learning through the use of information and communication technology. Ufi is responsible for **learndirect**, a government supported e-learning initiative. **learndirect** aims to boost the employability of individuals, and the productivity and competitiveness of organisations, by raising skill levels and reducing barriers to learning such as travel time and cost.

Ufi operates a network of more than 2,000 **learndirect** centres, and 6,000 UK Online centres providing access to a range of e-learning opportunities. It also runs a National Learning Advice Service which offers impartial information, advice and guidance on courses, careers, funding and childcare, either over the phone or via its website.

In 2005 the government established a review of Information, Advice and Guidance services in order to help achieve the long-term objective outlined in the White Paper, *Skills: Getting on in Business, Getting on in Work* (2005). This called for a universally available, high quality and well-used service offering linked information, advice and guidance for adults covering jobs, qualifications, training and related support such as childcare.

One element of the review was to conduct and evaluate a trial extension of the Ufi/ **learndirect** telephone guidance service to handle a substantially larger volume of calls. Many disadvantaged groups targeted by career guidance services tend to be reluctant to use services that are administered in a formal institutional context (OECD, 2004b). Therefore the guidance trial offered the opportunity to try to engage a broad range of clients. The trial was to focus specifically on clients aiming to progress their career to a Level 3 qualification or beyond, and people returning to work from career breaks. However, throughout the trial this has been broadened to include individuals who are unemployed, who have been made redundant or who are facing redundancy, and anyone looking to return to the labour market. In addition, the guidance service previously provided by **learndirect** continued to be available to all clients.

1.2 The guidance trial

The **learndirect** service as a whole is structured around three different levels (or 'tiers') of Information, Advice and Guidance (IAG), with three levels of advisors. Information Advisors (IAs) are the first point of contact for callers and are qualified to NVQ

Level 2 in Call Handling. They diagnose the callers' needs and refer them to other advisors as necessary. It was planned that IAs and Learning Advisors (LAs) would diagnose which level of advisor could effectively deal with the caller's enquiry and that they would explain the guidance service to the caller prior to them being transferred to a Lifelong Learning Advisor (LLA) in order to make the service more cost-effective (**learndirect**, 2005b). Where the caller's query requires an in-depth discussion callers are referred to either a LA or to a LLA. LAs are qualified to NVQ Level 3 in Advice and Guidance and deal mainly with advice queries.

The guidance trial service is provided by LLAs. **learndirect** had a small number of LLAs delivering telephone guidance prior to the trial. However, this service was not marketed and callers were referred to the LLAs by IAs and LAs. The increased telephone guidance service aimed to have 100 full-time advisors offering guidance (NVQ Level 4 qualified in Advice and Guidance). At the time of writing there were 77 advisors, some of whom work part-time, which meant there were 68.5 full-time equivalent employees. In October, after consultation with staff, LLAs were renamed as 'Careers Coaches' to be more user-friendly and to better convey to users the service they provide. However, throughout the report they are referred to as they were named at the period of the trial under review.

It was estimated that the guidance trial service would offer the caller up to sixty minutes of help over two or three calls. However, the length of time that advisors spend with callers may be more or less depending on the nature of the call and the caller's preferences. In addition, callers may not need or want to be re-contacted by the service. It was planned that the first call would focus on scoping and action planning, the second call would be a review of progress and the third call would provide motivational support and the exit. **learndirect** aimed to deal with 100,000 clients who required guidance over the 18 month period of the trial. It was acknowledged at the outset that not all clients would be likely to need the full three-stage service.

It was intended that each caller to the **learndirect** guidance service would receive a copy of their action plan, either via email or in the post. The action plan would detail the content of the call and the actions that were discussed, including the agreed date for the service to re-contact the client. Tailored comments on a CV can also be given if required and if the caller submits their CV to the service via email.

1.3 Existing adult guidance services

Funded by the Learning and Skills Council (LSC), nextstep is a nationally branded service, providing adults with face-to-face information and advice on learning and work. It is a national service in England that is delivered locally through a series of subcontractors. These organisations include voluntary and community organisations, specialists at working with particular target client groups, FE colleges, **learndirect** centres, Connexions, and private training providers. They must be quality assured to the matrix standard for advice and guidance, which includes requirements for demonstrating staff competence.

nextstep offers a universal information service on learning and work but prioritises its advisory support service to adults aged 20 and over who have yet to achieve a first Level 2 qualification (this is equivalent to 5 GCSEs grades A*-C). At the time of the study some providers also offered 'enhanced services' to a more limited number of clients. Enhanced services are no longer being offered in the LSC's current operational year (August 2006-July 2007). Some nextstep providers have been able to continue

some form of enhanced service to some client groups through funding from other sources.

The nextstep information service tends to deal with relatively straight-forward enquiries from clients. More complex enquiries are referred for an advice session. Advice sessions are usually a face-to-face in-depth discussion between an advisor and client lasting for between half an hour and an hour. There is no time limit on the time prescribed by the LSC for the session (though individual services have staffing constraints). The advice session focuses on the client's current position, work, and learning aspirations and ways in which they might achieve them. This can lead to the formulation of an agreed action plan which sets out the steps the client could take to achieve their work and/or learning goals. Many of these clients are then re-contacted at a later date by an advisor who checks on their progress and if necessary schedules another appointment or provides further advice over the telephone. The number of advice sessions that any one individual receives is not restricted (LSC, 2006).

Many nextstep contractors have a telephone helpline. In some instances these are simply a way for clients to contact the organisation and book appointments, but in others they are also a medium by which advisors provide information and advice to clients.

1.4 Definitions

The language and definitions used to describe the process of supporting individuals to make decisions about their learning and work is one aspect of the national Information, Advice and Guidance (IAG) review. Hawthorn and Ford (2006) set out some of the specific challenges with defining IAG services in a way that is useful for policy makers and practitioners, but also meaningful for the general public.

It is not our intention to revisit this debate within this report. For the purposes of this evaluation, which is primarily of the **learndirect** telephone guidance service but which also makes comparisons to nextstep services, we will use the following terminology and definitions based on how organisations describe their own services.

- **learndirect** information service – telephone service provided by the Information Advisors qualified to at least NVQ Level 2.
- **learndirect** advice service – telephone service provided by Learning Advisors qualified to at least NVQ Level 3 and typically involving a conversation between a caller and advisor which lasts in the region of five to ten minutes.
- **learndirect** guidance – service provided over the telephone by Lifelong Learning Advisors qualified to at least NVQ Level 4. Callers may have up to three conversations with an LLA. The service includes a written action plan for those that are eligible.
- nextstep information – service providing telephone or face-to-face information about learning or work enquiries. Staff are encouraged to qualify to Level 2.
- nextstep advice – service provided face-to-face, or occasionally over the telephone. Staff who are encouraged to qualify to Level 3. The service can involve an action plan. In many instances clients are re-contacted and offered further advice either face-to-face or over the telephone.

- Enhanced services – an in-depth face-to-face service provided by nextstep services until the current operational year (August 2006-July 2007). Clients developed and implemented an action plan over a series of up to three face-to-face sessions.

1.5 Aims of the evaluation

The main aims of the evaluation are to assess:

- how successful the **learndirect** guidance trial has been in terms of generating and meeting demand for guidance
- the feasibility of delivering guidance at this level for these clients by telephone (rather than face-to-face), and the appropriateness of the guidance provided
- how far short-term positive outcomes of guidance are achieved
- the cost-effectiveness of the approach.

1.6 Objectives

In meeting these aims a number of objectives have been identified. These are to:

- monitor and measure the level and nature of demand generated for the Lifelong Learning Advisor service
- assess how well **learndirect** generates demand in line with expanding capacity to deal with it
- assess the feasibility of delivering appropriate guidance by telephone for the client groups
- make cost-effectiveness comparisons for this level of guidance between the telephone approach in the trial and the face-to-face approach of the local partnerships
- assess user satisfaction with the service
- examine the influence of the guidance on behaviour and decision-making on short-term outcomes.

1.7 Structure of the report

The rest of this report is structured as follows:

- Chapter 2 details the evaluation methodology that has been used.
- Chapter 3 focuses on how demand for the guidance trial has been generated, and explores the types of callers that have used the service and their reasons for phoning.
- Chapter 4 explores whether the guidance trial is able to meet demand from callers; user satisfaction with the service and its quality.

- Chapter 5 focuses on the outcomes of telephone guidance for callers.
- Chapter 6 explores the cost-effectiveness of providing guidance over the telephone compared to face-to-face delivery.
- Chapter 7 concludes.

2 Methodology

In order to meet the aims of the evaluation and obtain feedback on the experiences of a range of stakeholders (including callers to the service, nextstep contractors, and **learndirect** advisors) several strands of research have been undertaken. These include a literature review, interviews with **learndirect** advisors, interviews with nextstep contractors, a survey of callers, and an analysis of a sample of call recordings to the service. Further details are given below.

2.1 Literature review

A starting point for the evaluation was a brief literature review involving searches of government department websites and journal databases. Over 40 documents were reviewed, including government reports and academic journal articles relating to the provision of careers guidance, its potential outcomes, the nature of demand and the increasing use of technology. This provided the context for the trial and helped to inform the evaluation's research instruments. Where they provide useful background or context for the evaluation they are referenced in the main body of the report.

2.2 Context interviews

Three context interviews were carried out to provide an overview and insight into specific elements of the trial. The Marketing Manager for the **learndirect** advice and guidance services, the Senior Operations Manager at **bss** (the multi-media contact centre contracted by Ufi to deliver the guidance trial on behalf of **learndirect**) and the Senior IAG Policy Manager at the Learning and Skills Council were all interviewed.

2.3 Interviews with LLAs

The **learndirect** guidance service has been delivered by **bss** across two sites, one in Manchester and one in Leicester. Semi-structured interviews were carried out with **learndirect** advisors. These included discussion about advisors' experiences of delivering the trial, their perceptions of whether the referred callers were appropriate for the guidance service, issues in providing guidance over the telephone, views on how the service could be improved and what worked well.

Interviews with ten Lifelong Learning Advisors in the Leicester office took place in early May. They included staff who had been working as **learndirect** telephone

guidance advisors prior to the commencement of the trial, and advisors who had been recruited or promoted internally since January, as well as full and part time staff.

Interviews with eight Lifelong Learning Advisors, one Learning Advisor and one Information Advisor took place in July at the Manchester office. They also included a range of staff who had been providing telephone guidance prior to the trial and staff that had been recruited or promoted internally since.

2.4 Analysis of a sample of calls

Although callers may go on to experience positive outcomes in terms of enrolling on courses or finding work, it is also important to understand the quality of the guidance and whether the caller was given appropriate opportunities to discuss their situation. A team from the National Institute for Careers Education Counselling (NICEC) analysed a sample of 100 callers' experiences using a framework to assess the quality of each caller's first LLA call and then all subsequent calls. All NICEC team members had spent time in the Leicester **learndirect** call centre observing the work of **learndirect** LAs and LLAs.

The evaluation framework was constructed from sources of two kinds (see list of references). These were standards used in other guidance provision comparable with **learndirect** guidance, except that they were generally face-to-face (such as NVQ4, the Qualification in Careers Guidance, and nextstep criteria), and frameworks or training manuals for the giving of telephone advice (including **learndirect's** own Call Monitoring Criteria and some generic, not guidance-specific, advice lines).

The evaluation framework (Annex E) is divided into four sections (see Figure 2.1), although the fourth was only for use with second or subsequent interviews for any one caller. Under the framework each section attracts a 1-5 score (1 high), and the interview is then given an overall A-E grade (A high). A brief explanation of each score/grade is included on the first page of the framework (Annex E).

The scores and grades do not necessarily reflect accumulated points. This is because the framework cannot correspond in every respect to every interview, as a 'good' guidance interview can be very different according to the caller's needs. The framework offers a list of criteria for possible use, which requires the assessor's judgement about what would have been appropriate for that client. Thus some boxes or questions may not be used at all.

The framework was piloted with five recordings outside the main sample, and minor adjustments made. The early technical difficulties with the call recording system meant that the 100 calls were taken from between April-July 2006, with the vast majority in July. The sample of calls reflected a balance between callers' gender, whether or not they were in learning prior to the call, their employment status, and their existing level of qualification. The sample profile was based on the population of callers to the service between January and April 2006 who opened an action plan (see Annex A). Calls included some callers who had one call to the service and others who had two, and included advisors at both the Manchester and Leicester sites. The sample responded reasonably well with the proportions of service users identified from the **learndirect** management information (Annex A).

Figure 2.1: Framework outline

		1. Welcome
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SECTION I. PROCESS	A. Exploration	2. Contract 3. Agenda 4. Exploration of caller's situation
	B. Goal-setting	1. New perspectives/options 2. Information-giving 3. Decision-making
	C. Action-planning and ending interview	1. Agreeing courses of action (see also iii.3) 2. Ending interview
SECTION II. ADVISOR'S SKILLS CHECKLIST		1. Used in all guidance 2. Used particularly in guidance at a distance
SECTION III. APPARENT OUTCOMES FOR CALLER, THIS INTERVIEW		1. Apparent caller satisfaction 2. Apparent distance travelled 3. Apparent appropriateness of action plan
SECTION IV. APPARENT OUTCOMES FOR CALLER ALL INTERVIEWS SO FAR		1. Apparent caller satisfaction 2. Apparent distance travelled since first call 3. Reported behaviour change following guidance calls

Source: NICEC, 2006

It was important that an appropriate range of LLAs were included. LLAs were recruited to the team over the life of the project: in May there were approximately 65 LLAs whereas by the end of September there were 77 LLAs. Ninety-eight of the sample of calls were with 28 different LLAs, with two where the LLA was not identifiable. Therefore, nearly half of the advisors (and a higher proportion when averaged over the whole period) had at least one call that was assessed.

However, a disproportionate number of initial calls in the sample were taken by some individuals. For example, there were six calls each from three LLAs, seven from two LLAs, and eight, nine, and 12 in single cases. Only 19 calls were from LLAs who had only one or two calls in the sample, and when their profile of grades were compared with LLAs with three or more calls in the sample, it emerged that those that were getting somewhat better grades were more frequently heard. However, the numbers were too small to be significant, and it could be explained by the fact that we were hearing more of certain individuals because they had been working as LLAs for longer, or worked full-time as opposed to part-time, and we would, therefore, expect their grades to be higher.

There were fewer second LLA calls than had been anticipated, a total of 22, and no third calls. All these second calls were 'call-backs' by a member of the LLA team (someone who was on duty at the time the caller had said would be convenient for a call-back and not necessarily the LLA who had received the original call – in fact in the sample none were made by the original LLA). In 12 of the 22 call-backs, the conversation was so minimal (limited to checking that the caller was on track with plans made in the first call) that it was inappropriate to grade them.

2.5 Interviews with nextstep

Ten telephone interviews were carried out in June and early July with nextstep contract managers across England. The interviews were semi-structured, but included discussion about the impact of the guidance trial on their organisation, differences in providing face-to-face compared to telephone services, clients for whom face-to-face service might be more appropriate, and the ways in which nextstep services are marketed and delivered. The primary aim of the interviews was to gain an understanding of how, if at all, the **learndirect** guidance trial had affected their organisation and the provision of face-to-face services in their area. The interviews were also used to gain an understanding of the variety of contracts that nextstep agencies have to deliver advice and guidance services, and how they manage and run face-to-face advice and enhanced services.

2.6 Caller survey

A sample of 1,001 users of the **learndirect** guidance service in March and April 2006 were interviewed in July, so that two or three months could have elapsed since their guidance interview. Respondents were asked about their experiences of the **learndirect** guidance service, their satisfaction and any outcomes that had occurred as a result of the service. The **learndirect** guidance trial was still evolving in spring 2006 and it should be noted that the results from the caller survey presented in this report only reflect the views of service users in March and April.

The survey was piloted in May 2006 with 20 service users. Slight amendments to the questionnaire were made as a result and, in addition, two questions were added about sector specific information. The sample profile was based on the characteristics of the population of all users to the service between January 2006 and April 2006. One thousand callers were interviewed. The sample was stratified to include callers at a representative range of qualification levels, genders, some who were in learning at the time of calling and others who were not, and callers who were in work, unemployed and those who were currently out of the labour market.

The population data and the achieved sample are detailed in Annex B. Overall a representative sample was achieved and therefore the survey data was not weighted.

2.7 Analysis of management information

Management information provided information on the demand for and use of the **learndirect** guidance service and nextstep advice, as well as the characteristics of the service users. Management information held by **bss** on all callers to the service between January-July 2006 was made available. This included demographic information about service users, such as gender, level of qualification, and their reasons for calling.

A key difficulty in the analysis of the **learndirect** management information was the lack of a clear identifier of callers who were eligible for the guidance trial. The analysis, therefore, relies on proxies to create a base of eligible clients. The best available indicator for a caller entering the guidance trial was the indicator of action plan take-up. However, without an eligibility indicator the analysis cannot truly account for the rate at which eligible callers did not choose to take up the action plan option. These issues are discussed within the text at relevant points.

To aid the comparison of cost-effectiveness between nextstep advice services and **learndirect** telephone guidance, the national Learning and Skills Council nextstep database was analysed. The characteristics of users of nextstep services are compared to those of **learndirect**, using nextstep management information downloaded from the LSC's online system, MI Manager. Data was downloaded at the end of August 2006, when all July returns were completed. The period between 1 January and 31 July 2006 was selected to provide equivalence with coverage of the **learndirect** management information data. This data underpins the analysis relating to overall numbers accessing the service; characteristics of service users; and the way in which demand is generated.

Additional data are provided by the system in the form of 'target tables' which report the extent to which current targets are being met. At the time of analysis, target tables were available for the period from August 2005-April 2006 therefore these do not share the same base as other parts of the analysis. The analysis of action plan take-up draws upon this source and has been used in the cost-effectiveness calculations. As far as was possible, an equivalent analysis to that provided for **learndirect** was undertaken.

2.8 Analysis of financial information

learndirect provided their detailed cost breakdown of the actual expenditure on the trial between January 2006 and June 2006, and their budgeted cost information for the 18 month period over which the guidance trial is planned to run. The budget headers within this were: staffing costs; marketing; research and professional fees; advisor costs; systems/line rental and call cost. Management and administration costs are not separately specified in the **learndirect** budget. The quarter between April and June was chosen for analysis since it was felt that this would limit, to some extent, the impact of initial set-up costs in the analysis. This has not been wholly effective and this issue is discussed and the impact analysed in the cost-effectiveness chapter.

nextstep budget expenditure data was made available by the LSC for August 2005-July 2006 for 45 out of 47 contractors. This covered the same time period as the management information so could be used to create indicators of cost-effectiveness. To match the cost analysis base for **learndirect** the quarterly costs accrued in the period April-June 2006 were selected.

The information contained with the budget reports for nextstep was as follows: management of sub-contractors; administration of any contractor's non-delivery activities; accommodation of non-delivery staff; telecommunications; human resource management of contractor staff; finance of the contract; staff development; development, coordination and operation of **learndirect** referral points; coordination and quality assurance of local **learndirect** portal content; marketing materials; service quality assurance; impact analysis and evaluation of contractor. Issues about the development of the cost-effectiveness indicators and their limitations are discussed in full in Chapter 6.

3 Generating Demand

3.1 Summary

- Between January and July 2006 there were over 46,000 calls to the service, approximately 14,000 of which involved action planning. Demand has grown since January.
- There is also demand for guidance outside the remit of the trial.
- Most users of the service had heard about it via TV advertising. Some advisors felt that the adverts did not help callers to understand what the service offered, as many came misunderstanding what guidance could and could not do.
- The guidance trial has generated calls from adults who had not previously used adult careers services.
- The majority of calls to the service were from females. Most callers were aged between 25 and 49, and overall there was close to the same proportion of people in work as not in work (49 per cent and 51 per cent of all callers respectively).
- The proxy measure for women returners shows that the trial is successfully reaching this target group. The proxy measure for individuals wishing to qualify at Level 3 also suggests that **learndirect** is reaching this target group.
- Males, people aged over 50, and people qualified to higher levels are under-represented in the callers when compared to the population as a whole.
- Reasons for calling the service were varied. Needing a change was the most cited reason for calling among respondents to the caller survey (34 per cent).
- Prior to the trial there were a small number of referrals to nextstep from **learndirect**. Although the number of referrals from **learndirect** has decreased, overall demand for face-to-face services has been unaffected by the trial.

3.2 Marketing the service

At its broadest level, the audience for **learndirect** advice and guidance services is the 31.2 million people of working age in England. Within this there are 17.5 million people of working age whose qualifications are below Level 3 (**learndirect**, 2005b).

It is thought that demand for guidance exceeds supply (OECD, 2004b). The same international report noted that many people do not have access to guidance services because:

'It is delivered in too limited a range of locations, ways and times of the day or week, or at points in the lifecycle.'

(OECD, 2004b, p34).

This suggests that there is scope for more flexible methods of delivering guidance services, such as by telephone, to help meet demand from employed adults, women returning to work, older adults, remote communities and to extend access to guidance more broadly (OECD, 2004b).

In order to generate demand for **learnirect** telephone guidance, Ufi needed to make potential users aware that the service was available. Public awareness of providers of guidance is fairly low. In a survey of over 1,500 people, Taylor et al. (2005) found that one in four adults could not spontaneously think of any organisation that provided information, advice or guidance about work or learning. For the guidance trial Ufi was responsible for marketing the service, whilst **bss** was responsible for ensuring that calls generated could be answered and dealt with successfully.

3.2.1 The 'jigsaw' creative is developed

In the trial's planning stages, prior to its launch, Ufi researched the market to better understand the demand for telephone guidance, people's perceptions of guidance and to test creative ideas for marketing the service. Focus group and in-depth interview research with potential guidance service users by Rainey Kelly Campbell Roalfe (2005) revealed that an action plan containing details of the conversation with the advisor was a good idea, but that a three-stage plan might be a little intimidating.

Alongside gathering information about perceptions of guidance services, several creative ideas were explored in focus groups. The preferred creative option was the 'jigsaw' and this was the creative idea that was implemented. The jigsaw creative was an advertising campaign based on images of a jigsaw puzzle and the idea of a missing piece which **learnirect** could help find. The jigsaw creative was found to be popular and appealing among most groups. However, the research noted that women returners were less positive about the creative idea, some found it *'too overpowering'* and *'a little scary'* (Rosenblatt, 2005). However, using these adverts generated demand amongst women returners (section 3.2.1).

Television advertising was chosen to be the backbone of the media campaign to promote the **learnirect** guidance service. The **learnirect** advice line has been promoted on TV consistently since its launch in January. The jigsaw advert has run in both peak and daytime slots on satellite and digital, ITV, Channel 4 and Channel 5. **learnirect** advice also sponsored the Jeremy Kyle show, which is on ITV every weekday morning, and Sunday evening drama on ITV which included Heartbeat and Wild at Heart. Television advertising was complemented by other media targeting particular sub-groups such as women returners.

3.2.2 Television advertising generates the most demand

Given that the marketing strategy largely focused on TV advertising it is perhaps not surprising that callers most frequently said that they had heard about the guidance

service via this medium. Referrals from other organisations and word of mouth were also important sources of awareness.

Advisors can record 19 different sources of awareness which detail how the caller has heard about the service. These have been grouped in Table 3.1 to reduce and simplify the number of options. For instance, intermediary sources include Jobcentre Plus and nextstep. Learning campaigns include national campaigns such as 'Adult Learners' Week' and 'Sign Up Now'. The funding option includes callers who heard about the service from Adult Learning Grants as well as Student Finance. The remainder of the categories are ungrouped and presented as given in the management information.

Table 3.1: How callers heard about the service (January-July 2006)

	Action planners		All guidance callers	
	No	%	No	%
TV	5,370	49.6	15,381	42.1
Intermediary	2,728	25.2	11,524	31.6
Internet	1,801	16.6	6,129	16.8
Other helpline/course info line/telephone directory	535	4.9	2,341	6.4
Printed media	199	1.8	537	1.5
Outdoor media	91	0.8	249	0.7
Radio	54	0.5	141	0.4
Learning campaign (national or regional)	44	0.4	126	0.3
Funding source	11	0.1	90	0.2
<i>Total</i>	<i>10,833</i>		<i>36,518</i>	

Source: learndirect MI, 1 August 2006

Where appropriate the data in this report are presented for all callers to the guidance service and separately for callers who have negotiated an action plan with an advisor (who are called 'action planners'). For those callers for whom a source was recorded the most frequently mentioned was television. Amongst television sources, ITV is the most mentioned. Those that could remember whereabouts on TV they had seen the advert most frequently mentioned the Jeremy Kyle show. Television was more important as a source of awareness for action planners than all guidance callers, with nearly eight per cent more of these mentioning it as a source.

Although intermediaries are the second most frequently mentioned source amongst both groups, their role was more important in terms of guidance callers than amongst action planners. The intermediaries are wide-ranging and include Jobcentres, nextstep, friends, colleagues or relatives. Of those referrals from intermediary sources Jobcentre Plus accounted for two per cent of callers, and three per cent of action planners. Less than one per cent of callers to **learndirect** were referred by nextstep and one per cent of action planners.

Respondents to the caller survey were asked how they had heard of **learndirect** guidance and responses to this confirmed the pattern found in the management information, with a prominent role played by TV advertising. Just over two-thirds (67 per cent) of callers surveyed reported that they had first become aware of the in-depth advice offered by **learndirect** through television advertising. Other sources of awareness were cited by a small minority of callers with word of mouth, the internet

and Jobcentre Plus being the next most frequently reported (seven, six and five per cent respectively).

Although intermediary referrals to the guidance trial are not the main source of awareness among **learndirect** clients, most of the nextstep contractors we interviewed for this evaluation reported that they referred clients who were outside their target group to the guidance trial. However, for **learndirect** these are a minority of the clients they work with overall.

3.2.3 Initially callers do not always understand the service offer

Most callers are aware of the **learndirect** guidance service from TV adverts and sponsorship and, therefore, they are important in forming individuals' expectations of the service, along with any previous experience of advice and guidance. **learndirect** advisors reported that in many instances callers do not have realistic expectations of the guidance service, or what guidance more generally entails particularly in the extent of independent research that callers may be required to do and the responsibility for decision-making. Other areas where a few advisors felt the TV adverts could better explain the service to potential users prior to their call concerned the practicalities of making a call, such as the opening hours of the helpline and the likely length of the call. To some extent this is likely to be because the trial is reaching callers who are new to guidance.

The **learndirect** website offers a clear statement of the service (www.learndirect-advice.co.uk/featured/cag) and while it is not accessible to callers without computer skills, it is not clear what more a telephone service could do in providing an always-available benchmark for users to judge if they have received what was offered. However, from the call recordings NICEC were not aware of LLAs referring back to that list of activities.

After seeing the TV adverts or being referred by a friend or other organisation, callers to the **learndirect** helpline speak to an Information Advisor (IA) who diagnoses their needs and will then refer them as appropriate. This initial conversation with an IA is critical in ensuring that callers' needs are identified correctly, that callers are appropriately referred, and that callers are informed about what to expect from a guidance service.

Many of the LLAs reported that the content and depth of the initial conversation with the IA was variable and that some callers were, therefore, better prepared than others. Listening to and analysing the sample of call recordings also highlighted differences in the extent to which callers were briefed prior to their guidance session.

'It really helps your job if someone as an IA or LA has fully briefed the caller. A lot of people don't realise the amount of research that they might have to do. If the person in front of you hasn't diagnosed the call properly then this can create difficulties.'

Lifelong Learning Advisor

Only one IA was interviewed for the evaluation as this level of the service was not the primary focus. This IA expressed some uncertainty as to whether they were inducting callers appropriately and they suggested that the service could be improved if IAs received feedback in a structured and formal way from LLAs about the transfer process. Independently NICEC also recommended this.

The service could be improved by a clearer protocol detailing the information transferred at handover between an IA or LA and LLA (when the caller is on hold and cannot hear). With additional training, IAs and LAs could also be asked to include an assessment of literacy level and disability.

Callers who have been referred to the service from other organisations have potentially had the opportunity for someone within the referring organisation to explain the service to them. A few LLAs reported that referred callers occasionally had unrealistic or inaccurate expectations of what the service could offer and were not as well informed as they might be.

learndirect could work with partner organisations, such as Jobcentre Plus, who refer callers to the service to ensure that staff who make referrals are able to brief the caller about what to expect from the telephone guidance service.

Describing the service overcomes misunderstandings

The LLAs have a consistent approach of explaining the service to the caller, although it is tailored to callers as appropriate and is not scripted. The LLAs usually discuss the practicalities of the call, such as taking notes and making the call in a quiet room with enough time available for discussion. They also give the caller some expectation of what might be discussed in the session, such as their past experience and work history, past learning and qualifications, home and caring responsibilities and aspirations for the future (the NICEC analysis of calls found that this was indeed a feature of good or excellent calls, though was not always the case). For example, in one interview the LLA checked if this was the service the caller wanted by asking them what they were seeking from the interview and explaining the process. The LLA then negotiated the agenda. Again NICEC found that most elements of the contracting process were conscientiously followed and good interviews included an explanation that it was the caller who would have to make their own decisions even though the LLA would offer all the help he or she could.

Although LLAs report that many callers initially have unrealistic expectations of the service, the guidance trial has high levels of caller satisfaction (section 4.4). In the caller survey respondents who disagreed that the overall quality of the service was good (14 per cent) were asked why this was the case. Only two respondents cited reasons directly associated with mismatched expectations of the service created by the TV adverts. This may suggest that the advisors successfully explain the service to the majority of callers and realign their expectations.

3.3 The volume of calls

Generating demand for the **learndirect** telephone guidance trial, largely via TV advertising, has been the responsibility of Úfi. This section details information on the volume of calls to the **learndirect** guidance service and the demographic characteristics of callers.

3.3.1 Who calls?

The **learndirect** telephone guidance trial was a new service and therefore awareness of the service began to be created in January. There have been a limited number of creatives used to date. The adverts currently feature two younger workers and this may be affecting the pattern of demand thus far. Demand may change as the TV adverts extend their coverage of different population groups.

Between January and July 2006 the guidance service received over 46,000 calls, 30 per cent of which (approximately 14,000) involved action planning. Callers from a wide range of groups called the service, but the spread of calls was concentrated in particular groups and this is explored in this section.

Callers new to guidance

The guidance trial has generated calls from adults who had not previously thought about or used adult careers services (see Table 3.2). Of the survey respondents who gave a definite answer (ie not 'don't know'), over three-quarters had not used adult careers services. Callers in education at the time of first contact with the service were more likely than those not in education to say that they had used adult career guidance services before (31 per cent compared to 23 per cent). Whereas those who were not in education at the time of first contact were more likely to say that they had not thought about using careers services since leaving school (63 per cent compared to 49 per cent).

Table 3.2: Callers new to guidance

Before you heard that learndirect offered in-depth advice and guidance had you previously ...	%
Not thought about using adult career guidance services since you left school	61
Used career guidance services for adults since you left school	23
Thought about using adult career guidance services, but not yet done so	14
Don't know	2

*Source: **learndirect** caller survey, 2006*

A range of callers, but fewer older people

During the first call advisors record demographic information about callers using the management information system. The data in this section are presented for all callers to the guidance service and separately for callers who have negotiated an action plan with an advisor (see Table 3.3).

The management information shows that between January and July 2006 the majority of callers to the guidance service were female (54 per cent); this was slightly above the proportion of women in the labour market population, as estimated in the Labour Force Survey (LFS). **learndirect** worked with proportionately more callers who were not working.

Data on age was only collected for approximately 17,000 users of the **learndirect** guidance service due to a software fault, so analysis of this variable should be treated with caution. However, the data that are available suggest that there are significantly higher numbers of callers to **learndirect** who are younger than would be expected from

the population estimates and the numbers of callers aged over 50 are significantly fewer than would be expected.

There may be a number of reasons for this, including adults in this age group perceiving that guidance, or this form of guidance, is not relevant for them, or that **learndirect** adverts have not created demand amongst this age group. One LLA discussing this felt that younger people tend to feel that they have more time to explore career options, or to retrain. *'It's [the under-representation of older people] not about the service, but more about the market and how that works.'*

When asked how the service could be improved a few callers mentioned aspects regarding age, one of which said:

'They should make the service more aware to older generations because we just think it's for young people.'

Female, 43, in work, Level 2 qualified

Table 3.3: Characteristics of learndirect callers

	Action planners		All guidance callers		LFS	
	N	%	N	%	N	%
Gender						
Female	7,570	56.5	24,360	53.7	30,136,817	51.2
Male	5,836	43.5	20,975	46.3	28,676,893	48.8
Age*						
<=19	29	5.7	1,370	7.9	3,095,432	6.5
20-24	1,107	21.0	3,682	21.3	3,691,228	7.8
25-49	3,466	65.7	11,072	64.1	20,661,384	43.6
>=50	403	7.6	1,162	6.7	19,941,151	42.1
Work status						
Employed/self-employed	5,327	39.4	22,201	48.8	28,109,245	59.3
Unemployed and non-employed	8,208	60.6	23,329	51.3	19,279,950	40.6
Highest qualification						
Other	858	6.4	4,885	10.7	3,233,518	8.6
Below Level 2	4,571	33.9	16,181	35.5	12,639,963	33.5
Level 2	4,505	33.4	18,094	39.7	5,979,785	15.9
Level 3	1,878	13.9	3,466	7.6	5,765,680	15.3
Level 4 and above	1,672	12.4	2,985	6.5	10,067,617	26.7
Learning participation						
Currently in learning	820	6.0	3,036	6.6	—	—

* Data from 29,045 cases within the all caller data and 8,686 cases from the action planners was missing from this analysis which is attributed by **learndirect** to a technical/system error in the software managing the MI

Source: learndirect MI, 1 August 2006; LFS, Spring 06

Demand amongst older people could be increased by developing marketing centred on reasons for using the service that older people relate to. This would ensure that older people recognise that learndirect guidance could help them.

Qualified to a range of levels

learndirect is providing help to people who would not otherwise have access to any government-funded guidance, for example people who already have Level 2 qualifications, even if they are not in fields they can use in the current labour market.

Advisors do not collect information about whether or not a caller is seeking to undertake a Level 3 qualification. To gain an understanding of how the guidance trial is reaching this group we have estimated them using those already qualified to Level 2, although it is acknowledged that there may be some 'jumpers' to a Level 3 qualification from a position of no, or Level 1, qualifications.

Table 3.4 shows that the **learndirect** guidance trial is reaching people who are qualified at Level 2 and therefore likely to want to work towards a Level 3 qualification in a greater proportion than the working population overall.

Better qualified callers (Level 3 and above) appear more likely than those qualified to lower levels (below Level 2) to take up the action planning service. However, since their eligibility could not be robustly measured we cannot draw conclusions.

Table 3.4: Is the trial generating demand from the target groups? People wanting to qualify to Level 3

	Amongst action planners		Amongst all callers		In population est.	
	N	%	N	%	N	%
People qualified to Level 2	4,505	33.4	18,094	39.7	5,034,970	15.9
People qualified to Level 1 or 2	7,281	52.2	27,863	60.1	–	–

Source: learndirect MI, 1 August 2006; England Population - LFS Spring 2006

Women wanting to return to the labour market

Another group targeted by the trial is women looking to return to work after caring for children or other family members. The variables available in the management information are limited and do not represent women returners as understood by other analyses ie women who will be returning to the labour market after childcare or other care responsibilities (eg Tomlinson et al.). The analysis presented here is based on gender and whether the caller was non- or unemployed at the time of the call. This estimate captures all women looking to return to the labour market after a period of unemployment or inactivity, and does not only contain women returning to the labour market after caring for children or another adult.

Using this measure to find a similar group in the LFS, women wishing to return to the labour market represent just under one-fifth of the population (19 per cent) (see Table 3.5). In the caller population their representation is greater at just over one-quarter (27 per cent), and amongst those setting an action plan, stronger still at a little below one-third (32 per cent). By this measure it could be argued that the trial has been effective

at reaching women looking to return to the labour market. What is not known is to what extent they are doing so after caring for children or other adults.

Table 3.5: Is the trial generating demand from the target groups? Women returners

	Amongst action planners		Amongst all callers		In population est.	
	N	%	N	%	N	%
Women wishing to return to LM	4,523	32.4	12,350	26.7	9,452,953	19.2

Source: learndirect MI, 1 August 2006; England Population - LFS Spring 2006

Eligibility of callers has been approximated in this section. To better understand which groups of service users are eligible for but do not take-up the action planning service, eligibility should be collected with other management information.

3.3.2 Demand outside the target groups

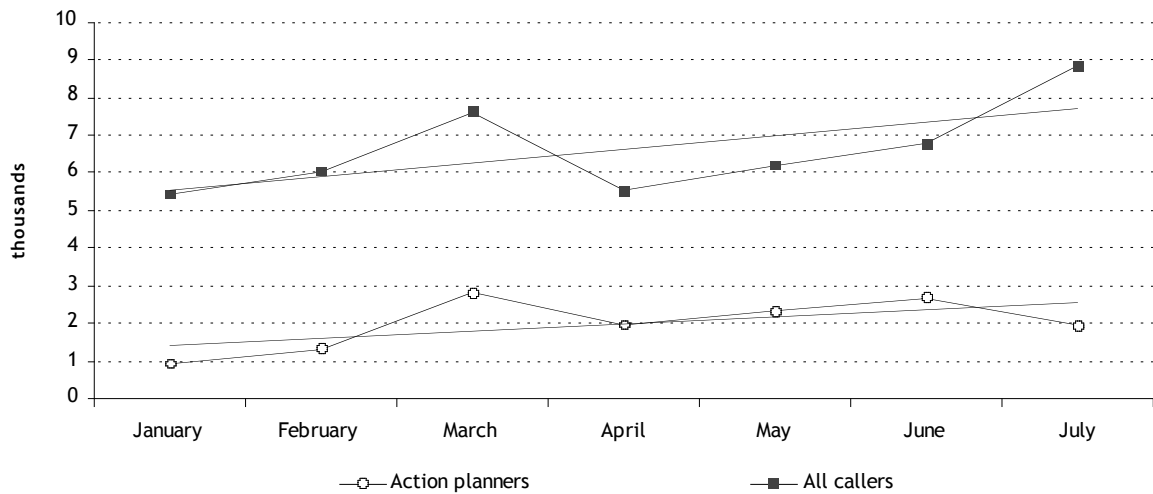
The trial has generated demand amongst the target groups of women returners and callers wishing to qualify to Level 3. However, several LLAs reported that there is considerable demand for guidance outside the target groups of the trial, particularly among individuals qualified at Level 3 or above.

Several nextstep contractors also reported that there was a demand for guidance from individuals who fall outside of the target groups, such as graduates and highly qualified people who are facing redundancy or who want to change career. nextstep face-to-face services are targeted at individuals qualified below Level 2 and therefore individuals who approach them who are not eligible for their services can be referred to **learndirect**.

3.3.3 When do people call?

The **learndirect** telephone guidance service has been continuously marketed using TV advertising since January 2006. To assess the demand across the period January-July the calls by month are presented in Figure 3.1 below. There has been a fairly steady stream of callers to the service with most months showing a proportion of around 12 per cent of all calls. However, there were peaks in the number of calls in March and more noticeably in July.

Figure 3.1: Number of guidance callers and action planners by month



Source: *learndirect MI*, 1 August 2006

Seasonal demand

Many of the LLAs and nextstep contractors we interviewed for the evaluation noted that the demand for guidance is sensitive to the time of year and to special events. For example, new school terms seem to increase the demand for guidance, and demand is lower in holidays and when there are special events. Watts and Dent (2002) also identified that the rate of calls to advice helplines is volatile, and sensitive to marketing campaigns. They also highlighted seasonal fluctuations, related, for example, to course start dates.

Figure 3.1 shows that demand for guidance and action planning built slightly over the three month period from the start of the trial to March. The TNS survey of a nationally representative sample of respondents between winter 2005 and June 2006 suggested that awareness that **learndirect** offered advice services also peaked in March 2006 with 80 per cent of respondents recognising the **learndirect** advice TV campaign (TNS, 2006). The increase in the number of guidance callers taking up an action plan in March may be explained by the change around this time in how the LLAs described the service. The contracting process was made less formal a few months into the service.

In April demand was lower, but the Easter holidays are likely to have affected this. Demand in May and June continued to be less than the peak in March and this could perhaps be explained by the football World Cup. In July, the number of calls to the guidance service increased again and recorded its highest number of calls in the seven month period.

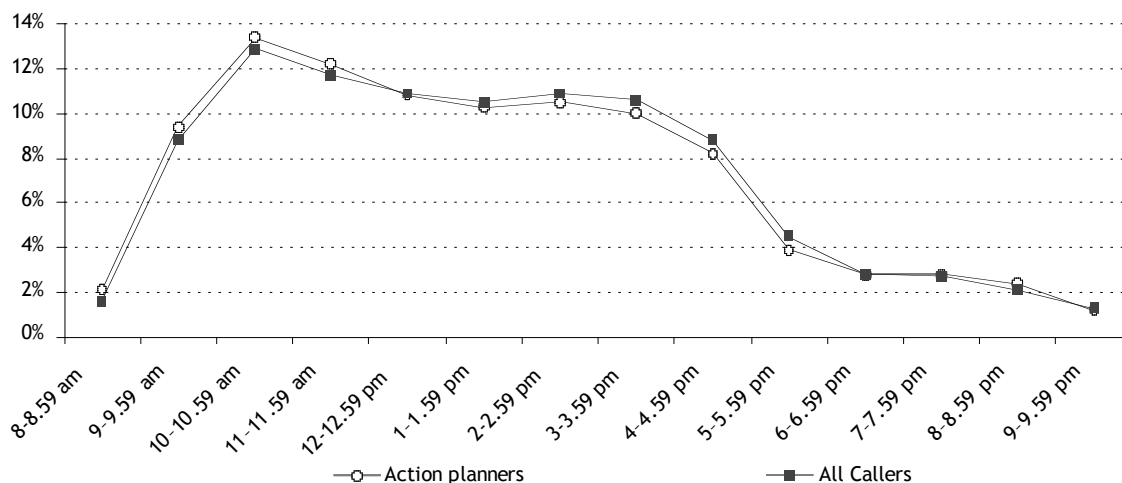
Between 10am and 4pm

One of the benefits of the guidance service was its accessibility. Ease of use and convenience were the most commonly reported benefits cited by respondents to the caller survey, with 51 and 59 per cent of respondents giving these as benefits of the service respectively (see section 4.1.6). Only two per cent of callers mentioned that a benefit of telephone guidance was its availability out of office hours and at weekends.

The service is available from 8am until 10pm seven days a week. Figure 3.2 shows the spread of calls by the time of day they were made.

The most popular time of day for calls to the service was during working hours, particularly between 10am and 4pm. Over two-thirds of calls to the service were received within these hours. Next most popular times to call were the hours just before and just after this peak: between 9am and 10am and after 4pm but before 5pm. During these two hours a further 18 per cent of calls are accounted for. Fifteen per cent of callers contact the service out of standard office hours, and only one per cent were recorded for the hour between 9pm and 10pm. The Jeremy Kyle show, which is sponsored by **learndirect**, runs from 9:25am-10:25am is carried every weekday morning. This may help to explain the morning peak in calls shown in Figure 3.2, although the figure includes both weekday and weekend calls.

Figure 3.2: Percentage of guidance callers and action planners by time of day



Source: *learndirect MI*, 1 August 2006

3.4 The nature of demand

Hawthorn, Maguire and Haughton (2002) quoted in Maguire (2004) found that the main reason for accessing guidance services was work related, to either improve chances of career progression or of getting a job. The evaluation of the Adult Guidance Pilots also found that the main reasons for seeking guidance were work related (Tyers et al., 2003). The caller survey and the **learndirect** management information show that callers used the **learndirect** guidance service for a range of reasons. The management information indicated that careers advice was the most common reason for calling, and changing career was the most commonly cited reason among caller survey respondents.

3.4.1 Why do callers ring?

LLAs reported some specific examples of the reasons why callers might use the service. However, almost all emphasised that there was not a typical caller or reason for calling the service.

'Some people call who have had a career and want to move to other work, and want help communicating that they want a lower paying job to employers and that they are still motivated and committed.'

Lifelong Learning Advisor

'Common problems are returning to work after having children and they want a part-time position, they want help explaining their gap in work and working through the skills they have gained as a parent. Another common problem is people wanting to move out of their current careers/change jobs and work through how to re-plan a way forward.'

Lifelong Learning Advisor

Advisors record the reasons users have for calling in the management information; more than one reason per caller can be recorded. Table 3.6 presents the data.

Table 3.6: Reasons for calling learndirect

	Action planners		All callers	
	No	%	No	%
To talk about...				
Careers advice	8,743	63	35,645	77
Action planning	5,956	43	6,437	14
Course search	4,000	29	21,548	47
Qualifications	2,428	17	9,214	20
CV Support	1,415	10	2,090	5
Funding	1,073	8	3,917	8
Interview preparation	346	2	625	1
Labour market Information	317	2	395	1
<i>Base</i>	<i>13,887</i>		<i>46,331</i>	

Source: learndirect MI, 1 August 2006, NB Multi-code responses

Looking at all the callers, close to half wanted help with a course search and two in ten wanted some advice about qualifications. Few callers wished to discuss funding, job interview preparation or labour market information, although analysis of the caller survey shows that service users value and expect local labour market information within their call (section 4.2.5).

These proportions are largely reflected amongst the action planners, although there are some noticeable differences. Fewer action planners were interested in help with finding a course and a slightly higher proportion sought help with the preparation of their CV. It is not clear from the management information whether the reasons callers telephone the service are what the guidance session has focused on. This is a particular concern given earlier advisor comments that callers do not always know what to expect from guidance services (section 3.1.3) and this information could be captured in the management information.

The categories used by learndirect advisors to record callers' reasons for using the service might be more usefully structured. For example, local labour market information is a category against which advisors can attribute a reason for calling. However, labour market information is more likely to be embedded within the guidance session rather than being a main reason for calling.

Other reasons why callers might ring could include wanting to change career, or to find work and these are not currently captured by the management information.

Needing a change

The caller survey asked respondents which of a number of broad statements best reflected their reasons for calling **learnirect**.

- The need for a change was the most frequently cited reason for calling, cited by one-third of all callers (34 per cent).
- Nearly one-fifth (18 per cent) indicated that they wanted to explore their options within the same career elsewhere.
- 14 per cent suggested that they wanted to find out about using their experience in a different type of work.
- Women were more likely than men to be looking to return to work after having children or looking after another person (20 per cent of women compared to five per cent of men).
- Men were more likely than women to have reported that they called due to facing redundancy or having been made redundant (12 per cent compared to six per cent).
- Older respondents were also considerably more likely to cite redundancy as the reason for calling the service (21 per cent compared to nine per cent of the total population).

Work related courses

Respondents to the caller survey were asked which of a number of aspects of work or learning they expected to receive advice or guidance about. Of these, the most commonly indicated areas were courses to do with a current or future job and advice and guidance related to careers (Table 3.7). Section 4.3.1 explores the extent to which callers received the advice they sought.

Table 3.7: Advice sought

Advice sought	%
Courses to do with a job/future job	42
Careers guidance or advice	39
Studying for qualifications	25
Help to improve your skills	24
Help with finding a job	23
Finding about sources of funding for training or studying	18
Help to improve your CV	12
Preparation for job interviews	7
Childcare provision	2
None of the above	2

Source: **learndirect** caller survey, *N= 1,001, NB: multi-response question and therefore responses do not sum to 100.

As discussed earlier, a caller's initial reasons for calling may differ from what is covered in the content of the call. One advisor described how individuals' initial reasons for calling the guidance service can differ from the subject matter that callers need to discuss:

'It [the reason for calling] will often be for a course. However, after probing you find that they don't necessarily know what they want or how the course will help them achieve what they want.'

learndirect Information Advisor

Further to the analysis in section 3.1.3 there is some evidence from the interviews with advisors to suggest that users of the service have not always formulated exact questions or know what they want to find out about prior to their call. This suggests callers are not always able to articulate that they need guidance. For example:

'Some callers phone for another reason and IA or LAs probe and find that guidance might be more appropriate for them. Some people phone and know that they want guidance.'

Lifelong Learning Advisor

'They don't ask for guidance but they may say they want some help – they don't know what to do.'

Learning Advisor

Although most callers to the guidance service have a guidance enquiry even if they cannot articulate it very clearly, five per cent of respondents to the caller survey indicated that their reason for calling was that *'they had not been actively seeking careers advice but had been offered it by an advisor'*. Although low, this proportion may support the perception among some advisors that some callers do not want or need guidance. While the majority of callers phone **learndirect** actively seeking some form of support, a small minority of demand for guidance is created within the service from callers using other **learndirect** services.

4 Meeting Demand

4.1 Summary

- The LLAs have an ongoing programme of development and access to relevant professional qualifications.
- Managers of LLAs often have little or no experience of practicing guidance, but overall are supportive.
- The LLAs are positive about the resources they have available to them and the frequency with which they are updated. More frequent sector-specific workshops would be helpful to develop specific knowledge.
- Three-quarters of respondents to the caller survey were satisfied with the helpfulness of the advisors. However, only 45 per cent of respondents were satisfied with the advisors' level of local knowledge.
- **learnirect** appears to be operating reasonably well alongside nextstep, making appropriate referrals where the caller is eligible.
- The trial has met demand from women returners, with 84 per cent saying they were now able to make an informed decision about their career.
- Lack of access to a computer or the Internet and the skills to use it can be a barrier to using the service.
- 58 per cent of respondents to the caller survey only had one session with an advisor and 23 per cent had just two. The three-stage call-back model has not been widely used.
- Respondents who reported agreeing an action plan were more likely than those who did not to report that the quality of the service was good, that they would recommend the service to a friend, and that they would use the service again.
- The telephone guidance trial is demonstrating that guidance can be provided over the telephone to the standard of best face-to-face practice.

4.2 Feasibility of telephone guidance

A key question for the evaluation is whether or not providing guidance over the telephone is feasible and if so whether **learndirect** has the capacity to deliver it. All of the LLAs interviewed for the evaluation were positive that guidance could be delivered effectively over the telephone, although there were some circumstances when doing so was challenging. While nextstep contractor's opinion was more divided, a large number felt that it was important for the client to be able to choose their preferred method. NICEC's analysis of a sample of calls showed that the **learndirect** telephone guidance trial is demonstrating that career guidance can be provided over the telephone to the standard of the best face-to-face provision. There are, however, some areas for further development which are explored throughout this chapter.

4.2.1 Visual clues

Watts and Dent (2002) noted that lack of access to visual clues, facial expressions and body language in telephone advice and guidance work could lead to miscommunication between the client and the advisor. One nextstep contractor commented that a lack of visual clues and non-verbal communication could make telephone guidance more challenging than face-to-face work in this regard. In addition, one LLA noted that not being able to see the client meant that the advisor could not pick up on whether or not the client's presentation was likely to be affecting their chance of gaining employment.

Although lack of visual clues could make telephone guidance more difficult than face-to-face guidance, one LLA reported that the extent to which a lack of visual clues created difficulties depended on the individual caller and their degree of openness, ie the suitability of the telephone as a medium for guidance depended on the caller and not on the medium per se.

Other LLAs reported that telephone guidance advisors honed their listening skills and became adept at reading the caller's tone of voice, and that they developed specific telephone-based listening and questioning techniques which minimised any difficulties associated with lack of visual clues.

'At the outset I had reservations about doing guidance on the telephone – there are no visual references, no body language to read but you learn to read their [the caller's] voice and their tone – you can tell their level of engagement from what they are saying and how they are interacting with the call.'

Lifelong Learning Advisor

'Before I had done the job I would have said it wasn't possible [to deliver guidance over the telephone] based on my experiences of offering face-to-face guidance. You don't have the body language and facial clues and I didn't believe you could get round that. But I have been amazed by the response to telephone guidance.'

Lifelong Learning Advisor

The caller cannot see the LLA and this also has possible drawbacks. For example, the caller cannot notice when the LLA's attention may be momentarily distracted while they search for and check information on their computer screens. Good practice here requires the LLA to explain what they are doing to the caller, and within the sample of calls NICEC found several examples of this.

One nextstep contractor also mentioned that working in a face-to-face setting meant that advisors could discretely spot whether a client had basic skills needs by seeing how they made notes of the session. From the scored quality analysis it appears that in **learnirect** telephone guidance it is generally left up to the caller to disclose whether they have skills for life needs, although better advisors check with callers whether they have had enough time to note down the details of the conversation and, for example, any referrals. Overall lack of visual clues is not a barrier for the service.

4.2.2 Accessibility, flexibility and anonymity

Due to its opening hours telephone guidance has the potential to be accessible to a wide range of clients. One consequence of opening seven days a week and for 14 hours a day is that the advisors' work shifts. Some advisors said that at times they found the changing shift patterns difficult to cope with. One advisor said that later into evening shifts callers were not always in a suitable frame of mind to carry out a guidance session, which they commented required a high degree of concentration.

The accessibility of the service is not just in terms of the opening hours. Telephone services have been noted to be of particular value in helping to increase access to guidance in rural and remote communities and in increasing access for those who cannot easily visit career guidance centres (OECD, 2004). Watts (2001) also reported that information and communications technology has the capacity to take services to individuals who find it difficult to visit physical centres, for example because they live in geographically remote areas.

A call to the **learnirect** guidance service can be made at any time during the opening hours and initial sessions are not pre-booked with appointment times. Not needing to arrange an appointment was cited as a benefit of telephone guidance by several LLAs. That the call could be made from the location of the caller's choosing and hence did not involve travel time or associated costs, was also felt by the LLAs to be positive. Immediate access to a guidance service when a client identifies a need for it has also been identified as a benefit of telephone guidance by Watts (2001).

Telephone guidance allows the caller to remain relatively anonymous. Several LLAs identified this as a strength, particularly when callers discussed sensitive subjects. Watts and Dent (2002) also identified that an advantage of telephone guidance is its anonymity, and discussed the greater equality provided by the fact that both parties are on their own territory, and that the client can terminate the call at any time by hanging up.

4.2.3 Distractions

Watts and Dent (2002) noted that with telephone guidance there was a risk of distractions in the environment, either for the advisor or for the caller, which could lead to miscommunication. Most LLAs noted that distractions on the caller side were rare as the advisor briefed the caller about a suitable environment in which to make the call prior to embarking on the guidance session. However, there were occasions when, for example, callers with young children had to attend to them part way through the guidance session.

When respondents to the caller survey were asked about any difficulties they experienced using telephone guidance only two per cent mentioned distractions in the same room. When listening to a sample of call recordings for the evaluation NICEC found that on occasions there was some background noise at the LLA end from other

guidance calls in the same centre, but the content of other conversations could not be heard. They found that distractions at the callers end were more frequent, for example children crying, or mobile phones ringing. However, distractions at either end of the phone were not felt to be a problem in the vast majority of calls.

4.2.4 Supporting clients with the use of resources

While telephone guidance can be accessible out of office hours, flexible, and anonymous, the physical distance between the caller and the advisor creates a different relationship than that of face-to-face services. The advisor cannot directly support the caller with activities, such as research work on computer packages. Several nextstep contractors reported that an important part of guidance was being able to support clients with the use of resources, and this was not felt to be feasible in a telephone setting.

IT

Since the trial the **learndirect** guidance service has added more ICT functionality to their software system via which to engage with the caller, and advisors are now able to email action plans to callers. IT is a strength of the **learndirect** guidance service and the website includes job profiles, a decision-making tool, a skills and interests assessment, and a CV builder. Useful and appropriate reference was made to all of these in one or more of interviews listened to for the evaluation, where either callers had already used them or the LLA recommended their use. An example of good use of these was an LLA who explained carefully just how to use one of the assessment packages including how it was structured and even how to log on. They also explained how the package related to the separate Job Profiles and how the idea of Job Families worked.

However, lack of access to a computer or the Internet, or a lack of skills to use the technology effectively was noted by several LLAs as being a potential barrier for callers. There are a number of paper-based diagnostic and other guidance aids that the LLA could put in the post, and within the sample of call recordings there were some examples of this (although there were other times when these could have helped but were not offered). While ICT can aid the work of LLAs, it is also important that they are able to support callers from whom paper-based resources might be more appropriate.

Respondents to the caller survey were asked whether they had any suggestions for how the **learndirect** guidance service could be improved. A small minority of callers reported that lack of access to computers and the Internet affected their experience of the service and that this aspect could have been improved.

'The whole computer side - lack of access to a PC was a problem for me, I was given lots of website addresses and email addresses but I couldn't use them because I cannot always get time or access to a computer.'

Female, 18, in work, Level 2 qualified

NICEC found that the LLAs were generally consistent in checking if the caller had access to a computer, but not so good at checking the caller was a confident user before recommending an electronic aid as part of the action plan.

In the few call-backs listened to by NICEC, gaining information via the Internet did not always seem to work, perhaps because of the difficulty of taking dictation of an

email or website address over the phone. More importantly, not all callers who lacked email were offered their action plan by post. In a face-to-face service a practitioner can check that a client is noting contact details correctly, and this is a problem where LLAs cannot judge caller literacy levels, spelling or the consequences of simple sound distortion over the phone.

When making recommendations and building action plans advisors need to gain an understanding not only of whether an individual has access to a computer but whether they are proficient at using it. Where this is not the case then alternative ways of accessing the relevant information should be offered. This should include posting callers a copy of their action plan and supporting guidance materials and information where necessary, and could include recommending face-to-face services, or giving the caller phone numbers instead of websites. LLAs could benefit from guidelines over which of these aids, both paper and electronic, to recommend to which callers.

4.2.5 Supporting a range of client groups

The client groups of nextstep, and **learndirect** telephone guidance are different, as will be discussed further in section 6.2.1. Several nextstep contractors reported that face-to-face guidance was better able to support harder-to-help client groups, such as those with no or low level qualifications, offenders and speakers of English as a second language. They felt that face-to-face work was a better way to build confidence and provide supported access to a range of materials. This section explores whether **learndirect** telephone guidance is feasible for a range of client groups.

Callers with English as a second language

One nextstep contractor felt that face-to-face work was better at widening participation and addressing barriers which, it was suggested, could not be as easily identified over the telephone. Another nextstep contractor commented that face-to-face guidance could better help individuals who were unsure what to ask about or how to formulate the questions to get the right help. Both suggested that these groups might include service users with poor literacy and English as a second language. Guidance users with English as a second language were reported to need a high level of language skills to use the telephone to discuss issues associated with work and learning. They suggested that people who do not have high level language skills might struggle in complex telephone situations without other visual clues.

A small proportion of the LLAs also reported that telephone guidance could be more difficult with callers for whom English was a second language or who had difficulties speaking English. However, the **learndirect** advisors did not feel that this would preclude these users from using the service successfully, but that any difficulties could be resolved by taking more time, by the advisor taking care of the language they used, pacing the call more slowly and checking the caller's understanding more frequently.

Respondents to the caller survey were asked if they had experienced any difficulties while using **learndirect** telephone guidance and they overwhelmingly reported that there had been no difficulties (85 per cent). However, of the difficulties that were highlighted by respondents the most commonly indicated was difficulty in communicating (five per cent).

The proportion of respondents who had difficulty communicating with telephone guidance is too small for further analysis to see which, if any, groups of individuals were most affected by this. It would have been interesting to see whether callers with English as a second language or those with lower level qualifications, as proposed by several nextstep contractors, found using the telephone a barrier to successful communication.

learn^{direct} runs advice lines in community languages and, over time, extending these to include guidance could be considered.

Callers with mental health problems

Although there was only felt to be a small minority of calls to the service from callers with mental health problems, some LLAs reported that these callers were challenging to communicate with over the telephone and not always suitable for or ready to engage with guidance. In these circumstances, and when callers revealed private and sensitive information about themselves during the course of a call, a proportion of LLAs in the first wave of interviews were concerned with where the boundaries of guidance ended and counselling began, and where and when it was appropriate to refer callers to other specialist support organisations.

By the second wave of interviews, although callers with mental health problems were still reported by advisors to be more challenging to work with, they seemed more confident in doing so and with the boundaries of guidance. Given the level of staff recruitment in the early period of the trial it is perhaps the case that as advisors gained more experience they grew more confident, better understood how to work with callers from a range of backgrounds and how and when to refer them appropriately.

Older people

The main framework for delivery seems to be working well overall. However, as the service develops it may be appropriate to look at its offer for specific groups. One of these is older people. With an ageing society and policy to try to extend working lives, it is important that telephone guidance is accessible to and feasible for older people. As Ford (2005) noted, large numbers of older workers want a change of occupation, for reasons that include the development of new interests and abilities, and the discovery of previously unrecognised potential.

The service needs to ensure that advisors are appropriately trained to explore issues that may be specific to older people. Older people's reasons for calling might differ from those of younger people. LLAs reported that some older people wanted to move into another type of work and called the service because they wanted advice about communicating to employers that, although they wanted a lower paying job or to work fewer hours, they were still motivated and committed.

From the sample of 100 calls data was available about the age of the caller in 68 cases. There were only four interviews with callers over 50. Two of these were graded excellent and one good, and the fourth was graded C. Towards the end of one interview a male caller aged over 50 said *'I'm so glad I found you ... I think I know the way I want to go now'*. Clearly on this evidence, if somewhat limited, the service is able to deliver guidance to older people.

The 14 per cent of respondents to the caller survey who disagreed that the quality of the service was good were asked why this was the case. A few callers commented that the service did not work for older people, although they did not explain why this was the case.

'I don't think they gave me enough advice especially as I'm about to retire'

Male, 54, in work at time of survey, Level 2 qualified

While feedback from any group of service users should not be disregarded, it is important to note that the labour market outcomes associated with receiving guidance may be different for different groups and to recognise that this might affect satisfaction with the service. Respondents aged over 50 were significantly less likely to agree that they received adequate guidance to help them make an informed decision about their career, and significantly less likely to say that they would recommend the service to a friend. In addition, older callers were less likely to go into learning as a result of **learndirect** than their younger counterparts (section 5.3.1).

There may also be a link between the use of IT to support the guidance process and the service's relationship with older people. Results from the National Statistics Omnibus Survey show that older people are less likely to have used the internet in the last three months and more likely to have never used it. Ten per cent of 16-24 year olds have never used the Internet, compared to 43 per cent of 55-64 year olds.

Developing a better range of resources that can be posted to people may help **learndirect** to work more successfully with older people. Training for advisors on the specific needs of older people and their reasons for calling may also be helpful.

4.2.6 Caller preference

Respondents to the caller survey were asked about their preferred method of receiving in-depth advice and guidance about careers. It should be noted that the majority of callers were new to adult guidance services and therefore were not likely to have had direct experience of the full range of services against which to compare. Table 4.1 shows caller preferences for guidance mediums.

Table 4.1: Caller preferences for guidance mediums

Medium	%
Telephone	42
Face-to-face	36
Email	11
Some other way	5
Don't know	6

*Source: **learndirect** caller survey, IES calculations*

Callers in employment at the time of their call were much less likely than unemployed or non-employed respondents to prefer telephone guidance (36 compared to 47 and 44 per cent respectively) and slightly more likely to prefer email guidance than the other two groups (14 per cent compared to nine per cent for both other groups).

Respondents from black and minority ethnic groups were slightly less likely than white respondents to prefer telephone guidance (38 per cent to 43 per cent) but more likely to cite email guidance as a preference (17 per cent to 10 per cent).

Respondents were asked to state a reason for their preferred method of guidance delivery. Of the 421 respondents who said they preferred to receive advice and guidance over the telephone:

- fifty-nine per cent stated that it was because it was more convenient
- fifty-one per cent said it was easy to use
- the free phone number was cited by 18 per cent
- only 11 per cent reported that there were no benefits.

Callers were asked to list any benefits associated with face-to-face guidance, and they could list more than one. The most commonly reported benefits by the respondents citing face-to-face guidance as their preferred method of receiving guidance included:

- more personal – cited by 31 per cent
- good to have human contact and discussion to build a relationship – cited by 23 per cent
- more in-depth – cited by 20 per cent.

The evidence presented in this section would suggest that many callers prefer to receive guidance via the telephone. Telephone guidance may be more, or less, appropriate for particular client groups, such as those with English as a second language. Overall the evidence suggests that it is feasible to deliver telephone guidance, although there are some client groups likely to need further support.

4.3 Capacity to meet demand

This section focuses on the capacity of **learn**direct to meet demand for telephone guidance. At the start of the trial **bss** was unsure about the level of demand that would be generated as a result of the TV campaign and other marketing. They also had the challenge of recruiting and training a sufficient number of LLAs to meet demand for the trial.

4.3.1 Recruitment

As little was known about providing telephone guidance on a large scale prior to the trial, **bss** recruited and trained staff gradually in order to gain some understanding of the level and nature of demand for telephone guidance prior to expanding recruitment more fully. Initially there were 14 LLAs who had given telephone guidance to **learn**direct callers prior to the trial, although their service was not marketed.

It was planned that over time there would be 100 LLAs. At the end of September there were 77 LLAs which equated to approximately 68.5 full-time equivalents. The majority of LLAs to date have been recruited via internal progression. **bss** planned a recruitment programme to IA and LA positions so that existing staff in these roles of appropriate calibre could be progressed to the LA and LLA roles. The capacity to

promote internally was limited to some extent because of the large number of new advisors that were needed.

External recruitment was less successful, primarily because applicants did not have the required mix of IT, telephone, and advice and guidance skills. By May 2006 approximately one in five LLAs had been recruited externally. The LLA person specification required individuals to have call handling skills and experience of dealing with a wide range of people by telephone (preferably in a call centre environment) and a minimum of 12 months experience of providing advice and guidance to adults.

4.3.2 Training and qualifications

Once recruited, new LLAs without experience of guidance had a two-week training programme as an LA and then a further two weeks at an LLA level before working on live calls. This included a week of class-room based training focused on the role of the LLA, call handling techniques, an overview of the theories of guidance, action planning, and understanding and using labour market information. The second week was then spent listening to calls taken by a qualified and experienced LLA. By the end of the second week's training the LLAs began to take guidance calls themselves.

Once in the LLA role all staff were required to work towards and complete an NVQ Level 4 in advice and guidance. They were also encouraged, on a regular basis, to listen back to a sample of calls to self-evaluate their performance or to listen back to calls with the guidance of a line-manager or other colleague.

In the first set of LLA interviews in May, advisors reported that due to high demand they had not had as much time as previously to listen back to calls and to reflect on their practice. Prior to the trial several LLAs mentioned that LLA meetings, or 'cluster groups', had been a useful forum via which to discuss and reflect on practice. These were also reported to be less frequent due to the demands of delivering the trial. By the LLA interviews in July, advisors reported that generally they had more time to listen to and evaluate their own calls and to reflect on their performance.

Advisors were mixed about the benefits of undertaking a NVQ Level 4. Generally all the advisors welcomed the opportunity to work towards a qualification. NVQs were typically felt to be a good way to reflect on practice and to analyse the process of guidance, such as the structure of the call. A minority of advisors felt that the NVQ did not relate to providing telephone guidance as well as it might and one LLA who had been involved with telephone guidance prior to the trial said that *'we [the LLAs] need help with the content rather than the processes.'* Other LLAs were critical of NVQs as they felt the qualification did not teach them new skills or enable them to develop their knowledge of guidance, rather it simply certified their existing practice.

One LLA mentioned that the NVQ had not been as useful as other forms of training, such as those which developed the advisors' working knowledge on specific sectors. This will be explored further in section 4.2.5.

The Centre for Guidance Studies designed a postgraduate course (MA in Careers Guidance Studies) for Ufi/ **learndirect** advisors who already had experience of guidance and a relevant Level 4 qualification. Five LLAs have had the opportunity to enrol so far. Combined with the NVQ Level 4, postgraduate study provides the LLAs with a clear continuous professional development pathway.

Careers advice and guidance for adults in England over the last 20 years has been structurally fragmented and funding short-term. Among other things this has made it

practically impossible for services to build up expertise over periods of more than a couple of years, as funding ends and staff disperse. One potential strength of the **learnirect** service by contrast, is that the guidance advisors are concentrated in two centres so that recruitment and professional development can be planned and sustained.

4.3.3 Management and support

All the LLAs interviewed for the evaluation felt supported by their management who were open to suggestions which, where appropriate, were acted upon. For example, towards the beginning of the trial LLAs would take LA calls if all the LAs were busy when a call came in, but an LLA was free. One LLA felt that this meant that on occasions LLAs then missed a guidance call as they were working on LA level calls. Over a period of time the advisors noted down instances when this occurred and presented it to the management team. As a result the protocols were changed and LLAs were no longer the default for LA calls when there were no LAs available.

Many of the team managers who directly supervise the LLAs were promoted internally from IA and LA roles prior to the development of the LLA role and the guidance trial, and hence have not worked delivering telephone guidance themselves. While generally advisors felt that managers were supportive of suggestions for improvement they noted that they were not always aware of the complexities of the LLA role or able to offer support or feedback on difficult calls as they had no direct experience themselves. In some instances LLAs sought the support and advice of other LLAs rather than their manager. Over time this is likely to become less of an issue as LLAs are promoted to managerial roles and the organisation develops a better understanding of telephone guidance.

In the interim managers who are supervising LLAs could, for example, be further trained about delivering guidance or someone with experience of providing guidance could be recruited to support line managers and LLAs with any questions or development issues.

4.3.4 Technology

The **bss** software system was developed to incorporate functionality for the guidance trial. For example advisors have been able to email callers. With any new system when it is first installed there are likely to be practical problems and staff will need to familiarise themselves with system and software. The start-up phase of the guidance trial was no exception and advisors initially experienced difficulties, many of which are now resolved.

4.3.5 Resources

The LLAs draw on a large range of resources to inform their discussions with callers. The large majority of LLAs were positive about the extent and nature of the resources that they had available and the frequency with which they were updated.

Most LLAs reported that they read statistical labour market information, such as the National Guidance Research Forum website, during any downtime or individual research time so that they could then use it to inform discussions with callers. Generally this type of information was felt to be more useful to build knowledge rather than for use directly during a call.

Information presented in workshops, such as sector-specific sessions run by Sector Skills Councils, was felt to be useful for updating advisors about trends in particular industries and occupations. Several advisors mentioned that more frequent sector or occupation based workshops would be helpful to build and develop their knowledge about specific areas of work.

Overall, callers were satisfied with the knowledge of the advisors with 70 per cent of all respondents to the caller survey either very or fairly satisfied with this aspect of the service. Respondents were asked to suggest areas for improvement with the service and two individuals mentioned that contact details needed to be more up-to-date.

'They were very forthcoming with numbers but some of the numbers weren't current and they need to keep more up to date.'

Male, 51, in work, Level 3 qualified

Another caller suggested that the service could be improved if it asked callers to feed back and, for example, let them know if contact information was out of date, or other services were available so that databases could be updated.

'Send feedback forms if we find out more information we can tell them.'

Female, 37, out of work for less than six months, Level 2 qualified

Asking callers about the accuracy of the information in their action plans in a call-back and then making any necessary amendments to databases could make use of feedback to enhance the service.

Local level information

Watts (2001) noted that as **learnirect** is primarily a national level service this could lead to a loss of quality in terms of access to local knowledge. This was also a large criticism of the **learnirect** guidance service by nextstep contractors. It was felt to be important for a range of local information to be embedded in the advice or guidance session. For example, the names and contact details of local organisations, transport links, and threatened firm closures.

Several nextstep contractors felt that the extent of local level information a client had increased the likelihood that identified actions would be carried out. Other nextstep contractors commented that local knowledge helped to build trust and confidence between the client and the advisor. Although information about transport links may be useful for a client it could be seen to be an information or advice level query rather than guidance.

The LLAs discussed how they ensured that callers got some degree of local level information within their session. One advisor reported how within the guidance session the caller and advisor discuss whether there is likely to be work that the caller is interested in within their local area. Another advisor said that local labour market information was available from some of the labour market sources that advisors use, but that it can be difficult to apply labour market statistics to a guidance session, as discussed in section 4.2.5.

Results from the caller survey reveal that nearly three-fifths (58 per cent) of respondents reported that some of the advice and guidance they had received from

learnirect was specific to their local area. When asked how important they felt it was that the advice and guidance they received was specific to local job and learning opportunities, over three-quarters suggested that it was either very important or fairly important (57 and 20 per cent respectively).

Thirty-two per cent of people who felt that it was very important and 21 per cent of those who felt that it was fairly important to receive area specific advice and guidance reported that they had not received this type of specific guidance. Callers who felt that it was important to get locally specific advice and guidance, and who did not receive it, were less likely than those who expected and received guidance tailored to their local area to say that they would use the service again (eight per cent compared to 24 per cent).

The majority of callers reported that they did receive some local level information and, on a range of measures of satisfaction, 45 per cent of respondents were satisfied with the advisors' knowledge of local jobs. However, there is no comparison figure for nextstep so we cannot compare this aspect of the two services with any certainty.

The scored quality analysis showed that as callers were considered to need an interview to discuss broad career options, local referrals were possibly less important. However, local information was needed when a caller was narrowing down on new goals. Local information was provided by the LLA (or had previously been provided by the Learning Adviser) in 56 of the calls in the sample. Of the remainder of calls there were only five in which NICEC considered local level information might have helped the caller. But in any case three of those five received interviews graded good or excellent.

In addition to the 56 callers who were offered local contacts, others were recommended national or local websites because they carried details of local training or employment opportunities. Examples included the Training and Development Agency for Schools, the NHS, NACRO, NCVO and the National Youth Agency at national level, and Local Authority websites at local level. In several other cases the caller themselves had researched local opportunities and wanted to discuss their relevance to their needs with the LLA.

Results from the caller survey suggest that service users are not as satisfied with this aspect of the service when compared with others, but this may be more to do with customer expectations of guidance rather than a reflection on the quality of this aspect of the service per se, although further work on this would be useful. The majority of call recordings included aspects of local level information and referrals which were often supplemented by national or local websites offering further local level information. Overall, the evidence would suggest that **learnirect** is able to deliver local level information to callers and to use it to inform guidance sessions where appropriate.

Sector specific information

It was planned that advisors would use sector specific and labour market information provided by Sector Skills Councils and that **learnirect** would work with the sector skills councils to develop advisor training. The LLAs discussed a range of sources via which they kept up-to-date with labour market information.

For sector specific enquires five advisors mentioned that they would refer the caller to the relevant Sector Skills Council, particularly if one of the caller's actions was to carry out further research into the sector. However, one LLA did note that the Sector

Skills Councils' offers were variable and, therefore, advisors had to be aware of what each sector skills council did and did not offer.

Where advisors had attended labour market information workshops run by sector skills councils they were very positive about them. For example one LLA had attended a workshop about the plumbing industry and felt that had helped to build knowledge and aid advisor understanding of what it was like to work in the industry.

Callers receive information on a range of industries

Two-thirds (66 per cent) of respondents to the caller survey reported that they had received industry specific guidance during their guidance sessions with **learnirect**. Callers received guidance about a wide range of industries, the most commonly cited being:

- health care and social care (14 per cent)
- accounting (12 per cent)
- primary and secondary schools (seven per cent)
- IT and call centres (six per cent)
- construction (six per cent).

Sector information is important to callers

Nearly three-quarters of callers surveyed suggested that it was either very important or fairly important to receive industry specific advice and guidance (55 and 17 per cent respectively). On a range of measures of satisfaction 58 per cent of respondents were satisfied with the advisors' knowledge of specific industries, compared to 75 per cent satisfaction with the helpfulness of the advisor.

The level and depth of sector information was a recurring theme suggested by a number of callers when asked how the service could be improved.

'I think they need more people that know about the type of work people want to do, there needs to be more experts, more specialised. For example, experts on healthcare careers, teachers, etc.'

Female, 36, after looking after home or family for five years or more,
Level 2 qualified

Moving forward

The evaluation of the Sector Skills Council Information, Advice and Guidance Project concluded that a principle role of the SSCs should be to produce timely sector labour market information (LMI) and to make this accessible to a range of IAG practitioners. Two-thirds of IAG practitioners surveyed for the SSC IAG Project reported that they did not find it easy to use and interpret LMI, which supports the findings from the LLA interviews. As with the LLAs, sector-based workshops were well-received by IAG practitioners and the evaluation suggested that they altered and informed practitioners' views about specific sectors (Graver et al., 2006).

IAG advisors also identified a demand for local and regional LMI and it was felt by the evaluators to be unlikely that this would be satisfied by the SSCs' current offer. The SSCs report that they do not have plans to provide local data owing to statistical reliability issues and a lack of resource to conduct local primary surveys. The project management team of the Sector Skills Council IAG project is leading a discussion to secure a Service Level Agreement on behalf of the SSC network with Ufi/**learn**direct, and has been urging all the SSCs involved in the project to commit to updating and reviewing the sector and job profiles on a regular basis (Graver et al., 2006).

Sector and industry specific information is clearly demanded by both callers and advisors so collaboration between the Sector Skills Councils and **learn**direct is to be encouraged. **learn**direct could better articulate demand for LMI from callers and advisors by systematically collecting details of the questions callers ask relating to sector-specific information. This could be fed to the SSCs and over time a better understanding of demand for LMI would be developed.

4.4 What did callers receive?

learndirect guidance received calls from a wide range of individuals, with varied personal circumstances, labour market achievements and aspirations. This section explores what callers received.

4.4.1 A personal guidance session

Callers received guidance on a range of subjects and over a varying number of calls which suggests that **learn**direct guidance provided a personal and tailored service to its callers. Respondents to the caller survey who agreed that the quality of the service was good were asked why they felt that was the case. The following comments from callers illustrate the value that callers place on the tailored service.

'No hurry on the phone and I felt that advisor was genuinely taking a personal interest in my case.'

Female, 36, in work at time of survey, out of work at time of call,
Level 3 qualified

'Because you can tell the person what you're looking for and they will find a solution for you as an individual, I think it's a tailor made service to suit everyone.'

Female, 37, looking after the home and family for five years or more,
Level 4 qualified

Section 3.3.1 outlined the reasons why callers rang **learn**direct for guidance. The need for a change was the most frequent reason for calling – cited by one-third of all respondents in the caller survey (34 per cent). Table 4.2 shows the proportion of people who sought and received guidance on a particular subject. The gaps between what callers sought and what they received could be caused by two factors. On one hand, as discussed in section 3.1.3, callers may have an idea of what they want or expect from the service, but this may not be what they need or what guidance can offer.

Table 4.2: Proportion receiving the guidance they sought

Area of advice received	% receiving advice	No. of people who
-------------------------	--------------------	-------------------

	they sought	sought advice
Courses to do with a job/future job	72	419
Studying for qualifications	62	251
Help to improve your CV	57	118
Finding about sources of funding for training or studying	57	182
Help to improve your skills	53	236
Help with finding a job	47	232

Source: learndirect caller survey, IES calculations

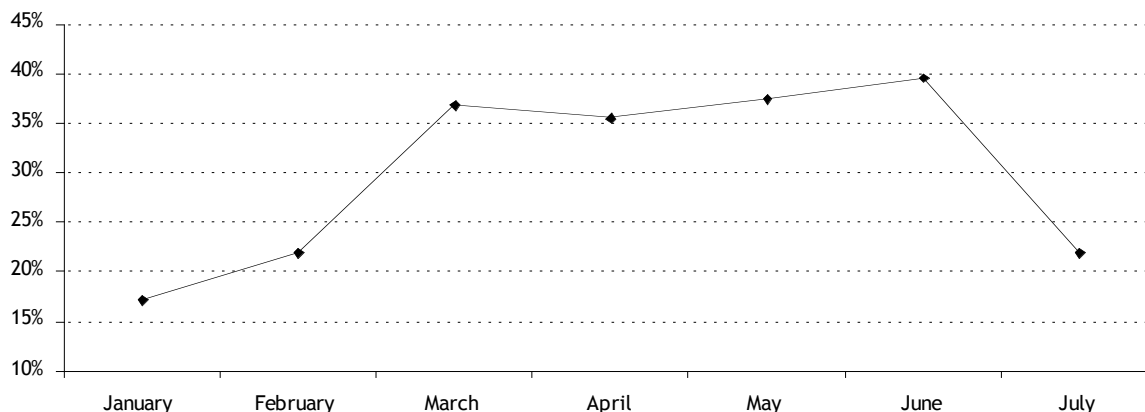
Alternatively, advisors may not be probing callers enough about callers' reasons for using the service and hence they may not be given the opportunity to discuss the factors that they were initially calling about. This does not seem likely as evidence from the sample of call recordings showed that advisors commonly asked callers if there was anything else they wanted to discuss before ending the call. Therefore this may indicate that what callers want shifts as they come to understand what is available, or that their reason for calling was replaced by something else they found out during the call, or that the caller realised what they thought was a problem wasn't a problem at all.

4.4.2 Action planning

Approximately 30 per cent of callers between January and July 2006 took up the action planning and call-back option. A proportion of guidance callers would not have been eligible for this more intensive support service and others who were eligible may not have wanted it. At the start of the trial the proportion of callers taking up the action planning service was lower than had been expected (see Figure 4.1).

Initially, the action planning service had been explained to callers at the beginning of the call and in fairly official-sounding language. In March advisors began to introduce the concept of action planning in a slightly different way to appear less bureaucratic and off-putting. Instead of saying action plan, LLAs said they introduced the action plan as '*a note of what the caller and advisor have discussed*' or '*a series of actions for you to carry out*'. Several LLAs described how they tailor their description of the action plan and call-back process to the individual.

Figure 4.1: The percentage of all learndirect guidance callers taking up an action plan



Source: *learndirect* management information January 2006-July 2006, IES calculations

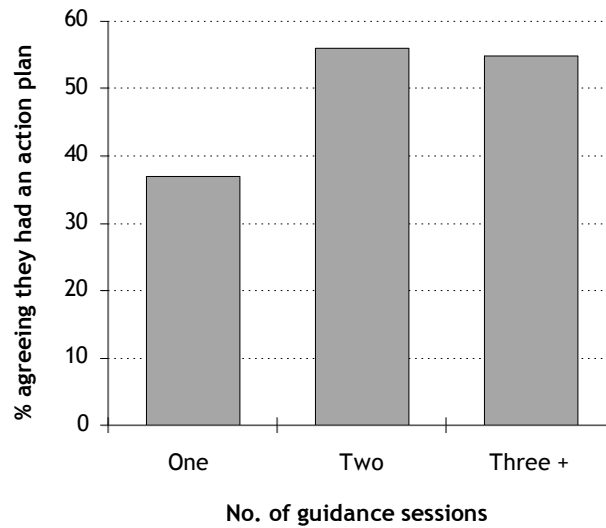
Listening to the sample of call recordings revealed that the best interviewers explained the concept of an action plan to the caller, as well as developing it. Generally callers welcomed the offer of being sent their action plan after the interview and, in principle, this can either happen by email or by post. The email option was typically offered in the calls listened to for the evaluation. Posting an action plan to those callers was less frequent (even where this might have been helpful).

All the respondents to the caller survey were noted in the management information as having developed an action plan. Despite this, only 44 per cent of callers surveyed reported having agreed some actions with an advisor and over half (56 per cent) thought that they had not agreed any actions. This may suggest that callers were not clear on their need to carry out any actions, that callers had different levels of commitment to carrying out actions, or it may reflect a difference in understanding of what callers and advisors consider an action. Alternatively, callers may not have received their action plan if email addresses were mistyped or if they did not have an email account and were not offered the opportunity for the action plan to be posted.

Procedure could be developed to ensure that all LLAs explain the concept of action planning to try to increase the number of callers that recognise they have had the service. This is particularly important given the variety of benefits for those people who recognise they have an action plan. Explaining the service would be best done at the end of the call. Alongside this it should be ensured that all callers receive a copy of their action plan either via email or by post.

The number of guidance sessions callers had received affected the likelihood of them reporting agreeing an action plan (see Figure 4.2). Respondents' original reason for calling **learndirect** was also associated with the likelihood of reporting agreeing an action plan. Those who had called to explore their career options, or those who were looking to return to work after caring for children or looking after another person were more likely to report agreeing an action plan (see Table 4.3).

Figure 4.2: Recognition of an action plan, by the number of guidance sessions



Source: *learnirect caller survey, IES calculations*

It is difficult to assess with any accuracy why respondents who are recorded as action planners do not recognise that they had any actions to carry out as a result of their call. What is clear is that those who did recognise or recall that they had actions to undertake after their guidance session more frequently reported benefits (such as increased motivation) as well as positive outcomes, and were more likely to agree that the quality of the service was good (see sections 5.2, 5.3 and 4.4).

Benefits of action planning

Respondents who reported agreeing an action plan with their advisor were asked what, if any, benefits there were. These included:

- increased motivation to take action (35 per cent)
- better understand of career options (32 per cent)
- helping to draw up a plan of action to develop their career (25 per cent)
- planning in manageable steps (22 per cent).

Table 4.3: Proportion of callers agreeing an action plan, by their reason for calling

Reason for calling learndirect	% reporting agreeing an action plan
You were looking to return to work after having children or looking after another person	51
You were wanting to explore options in your current career (same work elsewhere)	51
You needed a change	44
You were made redundant or facing redundancy	42
You were not actively seeking careers advice, but were offered it by an advisor	41
You were wanting to find out about using your work experience in a different type of work - eg a different industry	35
All respondents	44

Source: learndirect caller survey, IES calculations

Callers have control

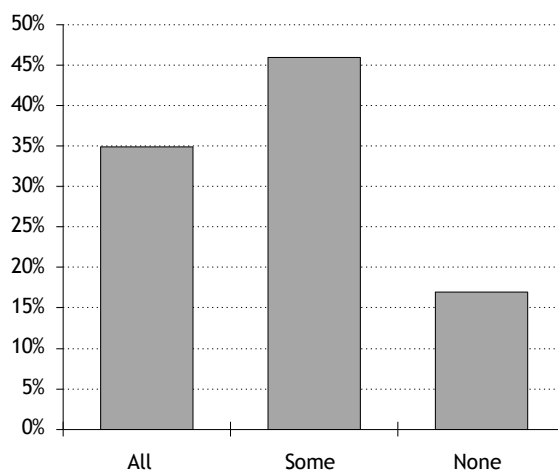
In the majority of cases the action plan was worked up with input by both the advisor and the caller, and agreed by both parties. Respondents who reported agreeing an action plan were asked to indicate how much control they felt they had over its content. The vast majority (89 per cent) of respondents felt that they had at least a fair amount of control over the content of their action plan with over half (56 per cent) reporting that they had a great deal of control. Less than one in ten felt that they had little or no control over their action plan's content.

Progress towards actions

LLAs reported that when they got back in touch with callers their progress towards the action plan was generally mixed. Some callers were reported to have completed it all, others some, and others none at all. The LLAs report that there are no actions that callers were more or less likely to take, or types of callers who were more or less likely to have completed or worked towards their action plan. The extent of completion was reported to depend on individual motivation and readiness to make a change.

Figure 4.3 shows that the majority of callers with an action plan reported carrying out some or all of their actions by the time of the survey. Of the respondents who reported that they had not completed all of the actions in their action plan nearly a third (32 per cent) said that it was because they had not had enough time to complete them and fifteen per cent of people indicated that the course or training they were hoping to do had not started yet. Both of these factors suggest that the proportion of callers with completed action plans is likely to increase over time.

Figure 4.3: Proportion of actions carried out amongst callers with an action plan



Source: *learndirect* caller survey, IES calculations

There was no statistically significant relationship between the date of first call (ie in March or April) and the extent of completed actions. This suggests that the extent to which callers had followed-up their action plan was not due to having more time to complete actions. To some extent this supports the LLAs hypothesis about individual motivation being an important determinant of whether or not an individual completes their actions.

Overall, where callers recall having an action plan they seem to have been developed in partnership, and to have been beneficial, with at least some, if not all, of the proposed actions carried out. In addition those who did recognise or recall that they had actions to undertake after their guidance session frequently reported positive outcomes and were more likely to agree that the quality of the service was good (see sections 5.2, 5.3 and 4.4).

4.4.3 Referrals

Within an action plan callers may be referred to other organisations or to software packages on the Internet, for example to find out about volunteering opportunities, or to research possible career options. While a great deal of local information can and is held in central databases, other local knowledge depends on individual practitioners' own networks or informal knowledge accumulated by a local agency. Examples might include what a local college will accept in the way of qualifications outside what is shown in the prospectus, or which employers might be sympathetic to offering work experience to people returning after a break. Not all nextstep agencies have been able to accumulate such knowledge, but where they have **learndirect** callers may benefit from a referral to their local nextstep office. The LLAs reported that they refer to a diverse range of organisations depending on the caller's needs.

LLAs frequently reported that callers eligible for nextstep are given referral details for their local office. However, several mentioned that nextstep's variable offer outside of the core LSC funded contract meant that they were sometimes uncertain about whether a caller would be eligible for face-to-face services in their local area. To compensate for this, typically, LLAs would refer callers for face-to-face support to nextstep with a caveat that they were an organisation who *might* be able to help them.

A comprehensive database with the services offered by each local nextstep, other than the core LSC funded contract, would help to make local level referrals easier and more effective.

Respondents to the caller survey were asked whether they had been referred to another organisation by a **learnirect** guidance advisor. One-fifth of callers (20 per cent) surveyed reported that they had been referred to another organisation. Callers who reported having agreed an action plan with their advisor were significantly more likely than those who did not, to report being referred to another organisation.

Of the respondents who were referred, 28 per cent were referred to colleges and universities, and 13 per cent to the internet. Less than ten per cent of callers that had been referred reported that they were referred to organisations such as Jobcentre Plus. Only five respondents reported that they had been referred to nextstep and eight respondents said they were referred to Sector Skills Councils.

The vast majority (78 per cent) of caller survey respondents who reported having been referred to another organisation reported following up their referral. Of the 39 people who did not follow up their referral, not having the time to do so, and not feeling that it was relevant, were the most commonly reported reasons, both being cited by one-third of respondents. Overall, the proportion of callers not following up referrals because of they did not see them as relevant is very small.

In the sample of 100 call recordings 27 callers were referred to nextstep. There were a further 18 where NICEC considered a local agency might have helped further, but of those 14 would not have been eligible for such help unless the local agency was funded outside the nextstep scheme as their qualification level was already Level 2 or over. NICEC judged that only four possibly relevant nextstep referrals were missed out of the 100 calls. Eight of the 18 received good or excellent **learnirect** guidance interviews anyway, and few nextstep agencies can offer more than advice even to their target group. It is not possible to know how many callers followed up the recommendation to nextstep, but results from the caller survey would suggest this is significantly lower than the number who were actually referred. In addition **learnirect** callers referred to nextstep may not necessarily tell the nextstep advisor that they had been referred by **learnirect**.

Overall the LLAs are referring to a diverse range of organisations, callers generally follow the referrals up, and have found them useful and relevant.

4.4.4 Call-backs

Eligible callers to the guidance trial were offered call-backs to see how they were progressing with their action plan and to support them if their circumstances or outlook changed. The trial aimed to test a call-back model and to see if there was demand for this type of intervention. While some callers found the follow-up service motivational, other callers reported that the service did not re-contact them as promised. The continuity of the service from the callers' perspective was also found to be an issue.

Three in five callers have one session

The majority of LLAs described how the call-back process enabled them to stage a caller's actions over two or more sessions which could be particularly useful for callers who had a range of things to work through before they achieved their career goal. A

three-stage service was the proposed model of support for eligible callers. Data on the number of sessions each caller had are not available from the management information, although this was collected for a sample of callers via the caller survey. Table 4.4 shows that the majority of callers have less than three sessions, with one the most common.

Table 4.4: The number of guidance sessions

No.	%
1	58
2	23
3+	16

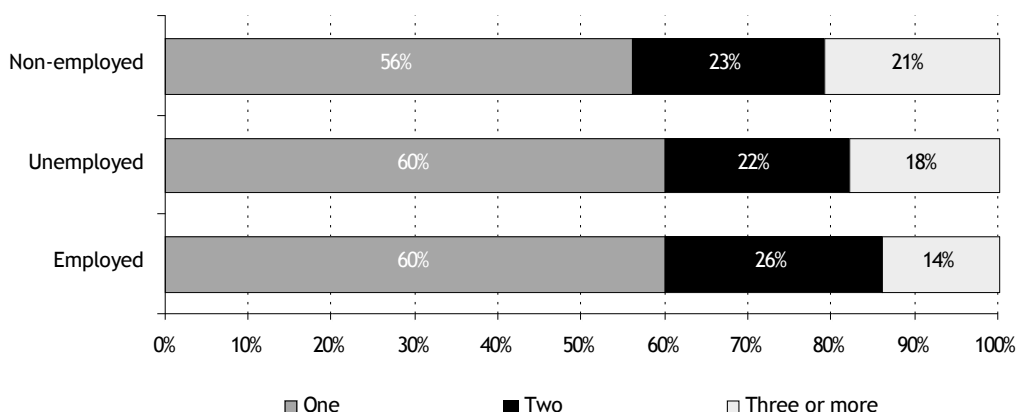
Source: learndirect caller survey, IES calculations

The content of the call and the number of call-backs is largely led by the preference of the caller. Data from the caller survey suggests that as just under three-fifths of all action planners had only one session with an advisor, a three-stage model in its current form has not been used by the majority of callers. This could suggest that this level of support is not required, or that the call-back system is not recontacting callers effectively with either callers or advisors missing appointments. Management information regarding completed or declined call-backs is not collected and therefore it is not possible to assess the reasons for this pattern with any certainty.

Three-stage model supports non-employed callers

Respondents who were not in the labour market at the time of their call to **learndirect** were the most likely group to have received three or more guidance sessions, with 21 per cent reporting this compared to 18 per cent of unemployed and 14 per cent of employed respondents (see Figure 4.4). This suggests that more intensive support may have a role in supporting particular client groups.

Figure 4.4: Number of guidance sessions by employment status



Source: learndirect caller survey, 2006

In their current form call-backs are not second guidance interviews

In the call recording analysis, the proportion of call-backs was close to that reported by callers, at 22. The NICEC team commented that while the offer of a call-back was welcomed by callers at the end of the first interview, call-backs in their current form should not necessarily be regarded as 'second guidance interviews' though some will develop as such.

LLAs could do more to use the call-back as a follow-up guidance interview: in one instance a call-back following an excellent first interview did no more than ask if the activities that had originally been suggested had given the caller any ideas. The caller said 'Yes' but instead of asking what they were and exploring them individually the LLA then asked if the caller had any other questions. The answer to this question was 'No' so the LLA ended the interview.

NICEC suggest that the potential of the second guidance session could be increased by further developing protocols detailing what should be covered in the call-back, so that the LLA probes into the appropriateness of the original action plan and can work with the caller to adjust it.

Continuity

The guidance trial proposal stated that access to one advisor throughout the three-stage model would be the ideal solution. Nevertheless **learnirect** were restricted by shift patterns to cover the opening hours, the availability of advisors, and covering sickness or leave absence. In the early stages of the trial advisors had their own caseload and followed up callers they had already dealt with. As the number of calls to the helpline expanded this changed as it was not felt to be practical.

Many of the LLAs reported that they would prefer to follow-up their own clients and that this would have specific benefits such as a more personal service and, from an individual perspective, learning what has worked well and what has not. For example, one LLA commented that:

'It would be good to see if people got things out of what you suggested and if it resulted in anything else. You can lose learning in terms of where you're referring to. For example, if you've referred someone to somewhere who weren't very helpful, then you don't pick up on this.'

Lifelong Learning Advisor

Despite this, several advisors acknowledged that having a case-load was not practical or compatible with the shift system. Where several advisors were working on one case the notes left on the system about previous calls were critical. Some LLAs said that the notes left by other advisors were not always adequate for someone new to the case and that, therefore, the caller might be frustrated by having to go over information and details that they had already covered previously.

Guidelines could be developed in consultation with advisors for the minimum amount of information entered onto the system about the first guidance session.

Other advisors felt that having different advisors could be positive for the caller. It was suggested that an advisor undertaking a follow-up call might have different suggestions or ideas for the caller. From listening to a sample of calls and their call-

backs, NICEC scored three of the ten assessable call-backs better than the initial interview, suggesting that in some cases it might benefit the caller to speak to someone different (as it might in a face-to-face service where the initial advisor did not achieve rapport with a client for whatever reason).

The multi-advisor approach has affected some callers' experiences of the telephone guidance trial both positively and negatively. The process of contracting with the IA or LA prior to the guidance call also seemed to add to the feeling of being 'passed around' and lack of continuity for some callers. A small number of callers suggested that greater continuity would be an improvement to the service.

'To see the same advisor every time as I have had meetings and I haven't had the same advisors so I have to explain my situation again to someone different.'

Female, 36, out of work for more than one month, but less than six months,
Level 4 qualified

However, in some instances callers welcomed the input from another advisor.

'I had two calls, one good and one bad. On my initial call, I phoned up and said I was stuck, I had just had a child and didn't know what I wanted to do, the woman I spoke to was rude and said she couldn't help if I didn't know what I wanted to do. She was very rude and it was a very negative experience. However, when I phoned again I spoke to a different advisor and he was the complete opposite.'

Female, 31, looking after the home or family for five years or more,
Level 3 qualified

The NICEC team recommend that call-backs be scheduled, where possible, with the original LLA. This would minimise callers feeling that they were passed around, and aid the ongoing professional development of the LLA who would learn from finding out what had happened next. However, it is acknowledged that due to the accessible opening hours, advisor shift patterns and the downtime that could be created mixing live calls and call-backs that this might not be feasible.

At the agreed time?

At the end of the first or second guidance call advisors can agree with callers a convenient time for the service to call them back. Generally the advisor tried the client twice during the specified half day period; if the caller was not available then they have to recontact the service. There were a limited number of call-back slots and LLAs reported that sometimes when, for example, call-back interviews had taken longer than anticipated, some callers had to be moved to another time and hence were not contacted when agreed.

Some respondents from the caller survey reported that advisors had not rung them back. Of the 14 per cent of callers who disagreed that the quality of the service was good 19 per cent of them said that this was because an advisor had not called them back when they said they would.

A widely reported problem by LLAs was that callers were not in or not available at the time they had agreed for the follow-up call. One LLA suggested that callers could be reminded of their appointment via a text message or email the day before the advisor was due to call.

For the call-back service to be effective it is essential both that the advisors call at the agreed time and that callers are available when they said they would be. Unfortunately the IT and management information system does not capture when callers are unavailable, or when a call back has been completed successfully, so we cannot quantitatively assess the extent of each of these issues.

Given the feedback from advisors and callers about missed call-back appointments it would be useful to see how widespread this problem is and we would recommend that this information is captured.

For call-backs to be more effective texting or emailing callers reminders prior to the call-back could be trialled.

4.5 User satisfaction

User satisfaction is one way in which service quality can be measured, and the extent to which **learndirect** guidance has been able to meet callers’ expectations assessed. The data presented in this section largely draws from the caller survey which only reflects the opinions of users of the service in March and April; it is, however, supplemented by evidence from other **learndirect** surveys. The **learndirect** guidance trial has been evolving since January, both procedurally and as newly recruited LLAs settled into their job role.

Using the same question as the ongoing customer satisfaction survey for **learndirect** information, advice and guidance services, the caller survey asked respondents to rate various aspects of the service. Table 4.5 details the results. On balance callers were most likely to be satisfied with the helpfulness of the advisor and the advisor’s understanding of their needs, and on balance least likely to be satisfied with the advisors’ knowledge of local jobs and the advisors’ knowledge of particular industries.

Irving and Slater (2002) in their evaluation of Adult Guidance Partnerships found that the more in-depth the service, the greater client satisfaction. By using the same question wording as the on-going **learndirect** customer satisfaction survey the extent to which satisfaction with the guidance trial compares to **learndirect’s** advice and information services can be assessed. The same survey was recently modified to assess customer satisfaction with the guidance service and these results are presented in Table 4.6.

Table 4.5: Satisfaction with the learndirect service

How satisfied were you with...	Mean score*	Not at all satisfied - 1	2	3	4	Very satisfied - 5	Don't know	% satisfied
Helpfulness of the advisor	4.12	5	5	14	26	49	1	75
Advisor’s understanding of your needs	3.96	6	6	17	27	42	2	69
Amount of time spent with advisor	3.96	5	6	16	28	41	2	69
Advisor’s level of knowledge	3.95	6	7	15	29	41	2	70
Usefulness of the conversation	3.89	6	9	16	26	41	1	67
Suggestions of additional information	3.76	8	8	18	27	35	4	62

Getting a practical answer/ solution	3.74	9	9	16	27	36	3	63
Advisor's knowledge of particular industries	3.73	6	8	22	27	31	6	58
Advisor's knowledge of local jobs	3.5	9	10	19	19	25	19	44
Average satisfaction score	3.86	–	–	–	–	–	–	–

* 'Do not know' treated as missing

Source: *learndirect* caller survey, IES calculations

The population of respondents of BMG's research among guidance users between March and June 2006 is slightly different from the caller population of the *learndirect* guidance trial survey (Annex D). Compared to BMG's research, the caller survey has fewer individuals qualified below Level 2, more individuals who are unemployed and fewer who are inactive. In addition, BMG's research includes one-off guidance callers who are not eligible for the more intensive service.

Table 4.6: A comparison of satisfaction with other *learndirect* services (per cent)

	Core service January-June	Guidance service March-June	<i>learndirect</i> guidance trial March-April caller survey
The advisor's level of knowledge	73%	76%	70%
The helpfulness of the advisor	79%	84%	75%

BMG Research Report (2006) and learndirect guidance trial evaluation caller survey

Given that the questions asked were worded in the same way, it is interesting to see the differences in the percentage of callers who were satisfied with various aspects of the service. Satisfaction with the helpfulness of the advisor, as reported by users of the service further into the lifetime of the trial, is significantly different and illustrates that the service has been changing from a customer perspective with increasing satisfaction levels.

A quality service

Respondents to the caller survey conducted for the evaluation were asked about the overall quality of the service. The vast majority (86 per cent) of respondents either agreed or agreed strongly with the statement '*the overall quality of the *learndirect* guidance service was good*'. Women were slightly more likely to agree or agree strongly with the statement than men, and respondents who reported having agreed an action plan were more likely to agree than were those who did not (91 compared to 82 per cent).

When compared to the answers to the same question in the ongoing *learndirect* customer satisfaction survey 91 per cent of users of guidance service between March and June also said the same. This difference is significant and indicates an improvement in customers' perceptions of the quality of the service over the lifetime of the trial.

Of the respondents to the survey for the evaluation 14 per cent either disagreed or disagreed strongly with the statement '*the overall quality of the *learndirect* guidance service was good*'. The reasons why are shown in Table 4.7.

Table 4.7: Why was the overall quality of the learndirect guidance service not good?

Reason	%
Did not deliver what was promised/ Offered no help/advice	39
Did not follow up/return calls	19
Unhelpful/bad response to enquiry	16
Information/advice was incorrect/inappropriate	12

Base - those disagreeing that the quality of the service was good = 141

Source: *learndirect caller survey 2006, IES calculations*

Helpful in making an informed decision

All respondents to the caller survey were asked if they felt that the guidance they had received was adequate to help them make an informed decision about their career. Nearly three-quarters (74 per cent) of respondents answered 'Yes' to this question, with 22 per cent answering 'No' and four per cent answering 'Don't know'.

Of the respondents who offered a definite response (ie those who answered other than don't know), women were more likely than men to feel that the guidance had helped them make an informed decision about their career (81 compared to 72 per cent).

When compared to all other age groups, older respondents were less likely to agree that the guidance helped them to make an informed decision (Table 4.8).

Respondents who reported having agreed an action plan with an advisor were significantly more likely, than those who had not, to say that the guidance they received helped them make an informed choice about their career (85 per cent compared to 71 per cent).

Table 4.8: Guidance helped to make an informed decision, by age

Age	% agreeing
50+	64
35-49	78
25-34	81
<25	79

Source: *learndirect caller survey 2006, IES calculations*

There was also a significant association between reason for first call and whether respondents felt that the guidance had been sufficient. Respondents whose original reason for calling **learndirect** was due to being made redundant or facing redundancy, and those callers who were not actively seeking guidance, were much more likely to say that they had not received adequate guidance. Those who were most likely to say that the guidance had been adequate enough to make an informed decision regarding their career were respondents looking to return to work after undertaking caring responsibilities (see Table 4.9).

The trial is generating demand amongst callers who were looking to return to work after caring for children or other family members. Data presented in the first row of Table 4.9 suggest that the trial is not only reaching, but also meeting demand from this target group.

Table 4.9: Do you feel that you received adequate guidance to make an informed decision?

	Yes (%)	No (%)
You were looking to return to work after having children or looking after another person	84	16
You were wanting to explore options in your current career - (same work elsewhere)	82	18
You needed a change	78	22
You were wanting to find out about using your work experience in a different type of work - eg a different industry	74	26
You were made redundant or facing redundancy	67	33
You were not actively seeking careers advice, but were offered it by an advisor	66	34
All respondents	77	23

*'Do not know' as missing

Source: *learndirect* caller survey, IES calculations

Impartial advice

The majority (87 per cent) of callers reported that they had been given impartial advice by **learndirect**, with only nine per cent feeling that the advice was not impartial and three per cent reporting 'don't know'. Respondents who reported agreeing an action plan were more likely than those who had not to report that the advice they had received was impartial (95 compared to 87 per cent).

The question used in the caller survey carried out for the evaluation is also used in **learndirect's** ongoing evaluation of its customer satisfaction. Comparing the results from these two surveys suggests that callers to the guidance service are more likely to report that the service is impartial. Almost four-fifths of the core service respondents reported that they were given impartial advice by **learndirect** (79 per cent).

Would recommend to a friend

Eighty-five per cent of respondents to the caller survey said that they would recommend using the **learndirect** guidance service to a friend, with only 11 per cent saying they would not (four per cent answered 'don't know').

Of the respondents who offered a definite answer, those who said they would recommend **learndirect** to a friend were more likely to:

- **report agreeing an action plan** (93 per cent compared to 84 per cent who did not recognise they had one)
- **be aged under 50** (see Table 4.10)
- **be female** (91 per cent compared to 85 per cent of men)

- **be qualified below Level 2** (92 per cent compared to 87 per cent qualified at Level 2 or above)
- have been calling **learndirect** looking for careers advice (see Table 4.11).

The majority of users of the guidance service appear satisfied. There were several examples of callers who when asked why they would recommend **learndirect** guidance to a friend recounted positive experiences of the service.

'My particular position or situation was awkward, but the guidance I received was excellent - I didn't know what to do to go about achieving my aims, they gave me a push when I needed it.'

Male, 40, in work, Level 3 qualified

'I think they bring clarity and understanding to what's available particularly when you're looking for something your not sure about.'

Male, 43, in work, Level 4

*'It was a shock to be made redundant at my age and **learndirect** gave me the advice and help that I needed at a difficult time.'*

Female, 48, in work

Would call again

The vast majority (81 per cent) of respondents suggested that they would use the **learndirect** guidance service again in the future. Thirteen per cent said that they would not, and six per cent answered 'don't know'. Of the respondents who gave a definite answer, those who reported agreeing an action plan were significantly more likely, than those who did not, to say that they would use the service again (92 compared to 81 per cent).

Table 4.10: Recommendation of learndirect to a friend, by age

<u>Age</u>	<u>% recommend</u>
50+	78
35-49	88
25-34	91
<25	88

Source: learndirect caller survey 2006, IES calculations

Table 4.11: 'Would you recommend using learndirect?' by reason for first call

	<u>Yes (%)</u>	<u>No (%)</u>
You were wanting to explore options in your current career - (same work elsewhere)	92	8
You were looking to return to work after having children or looking after another person	91	9
You were wanting to find out about using your work experience in a different type of work - eg a different industry	88	12
You needed a change	88	12
You were made redundant or facing redundancy	83	17
You were not actively seeking careers advice, but were offered it by an advisor	73	27
All respondents	88	12

* N= 963, 'Do not know' as missing.

Source: learndirect caller survey, IES calculations

Recognising an action plan is influential

Whether or not an individual can recall developing an action plan with an advisor affects several measures of customer satisfaction. Respondents who reported agreeing an action plan were more likely than those who did not report having an action plan to agree that the quality of the service was good, that they would recommend **learndirect** guidance to a friend, and to say that they would use the service again.

4.6 Quality assessment

Several nextstep contractors reported their concerns about the quality of telephone guidance, although one interviewee acknowledged that to some extent quality, whether in a telephone or face-to-face setting, depended upon the advisor. To assess the quality of **learndirect** guidance NICEC developed a framework against which to listen to and score a sample of calls (see section 2.4).

In the absence of a control group it was not possible to compare the findings of the NICEC evaluation directly with face-to-face work. This is an area for possible future investigation.

learndirect guidance is of good quality

Overall the NICEC team found the **learndirect** guidance service was individualised, warm and supportive. LLAs are qualified at NVQ Level 4 (or working towards it) and the fact that many have a background in call-centre work appeared to be an added strength.

The analysis of the grades of call recordings showed that **learndirect** guidance was of a good quality measured against standards used in the assessment of face-to-face guidance, with a significant proportion of calls graded excellent (see Table 4.12).

Table 4.12: Overall grades of initial LLA calls (specific section scores not included)

A	B	C	D	E	Total
23	29	39	6	3	100

An A grade is summarised as ‘Interview and apparent outcomes excellent’; B that they are ‘good’ and C ‘acceptable’. D, that they are ‘significantly flawed, affecting apparent outcomes’ and E that the caller is ‘possibly disadvantaged’ as a result of the interview

*Source: NICEC analysis of **learndirect** guidance call recordings, 2006*

Allowing for the fact that a C overall grade is ‘acceptable’ and that for a truly excellent professional service a user would want ‘good’ or ‘excellent’, an A or B score was regarded as comparable to the best face-to-face guidance. Over half of the calls were graded at this standard, a notable achievement considering the sample was taken in the early stages of the telephone guidance service and advisors had been recruited throughout the lifetime of the trial with many in position only a few months.

Apparent outcomes consisted of (in the view of the evaluation team) suitability of action plan, apparent ‘distance travelled’ by the caller, and apparent caller satisfaction. Apparent outcomes cannot reflect any actual changes in client behaviour or planfulness (this is reported on using the caller survey in Chapter 5).

Table 4.13 shows how the scores and grades compared in aggregate. It is worth noting that process, skills and apparent outcomes were still high, even where they varied from the overall grade (see Annex E and section 2.4 for further explanation of these measures). These seeming differences were caused, for example, where LLAs were good listeners and the apparent increased self-esteem that resulted for a caller moved them forward, even if other aspects of the interview were less good. Perhaps linked to this, apparent outcomes showed a particularly high proportion of 1 and 2 scores, indicating that nearly three-quarters of callers were ‘moving on’ to a good or considerable extent, were obtaining an appropriate or good action plan, and appeared or professed themselves to be satisfied with the help they received.

In a few cases individual LLAs did not seem to have quite completed their transition from earlier work as learning advisors, where their role would have been predominantly one of providing information and advice about learning options. However, as the grades in Table 4.12 show, this was not undermining the service as a whole and could be addressed through further training.

Table 4.13: Interview scores for first LLA calls by section of the evaluation framework

Score	Process	Skills	Apparent outcome this interview	Overall grade
-------	---------	--------	------------------------------------	---------------

1	21	24	25	A	23
2	33	26	47	B	29
3	36	35	20	C	39
4	7	12	7	D	6
5	3	3	1	E	3

Source: NICEC analysis of learndirect guidance call recordings, 2006

Recommendations for LAs moving to the LLA role include help to provide slower and more selective delivery of information, more exploration of the presenting question, and exploration of a caller's personal circumstances or leisure interests as well as employment goals.

In the more highly scoring interviews the NICEC team were impressed by the degree of autonomy given to and expected in the client, for example starting by asking the caller what they had already found out about an intended career move. Good pacing, regular summarising, and balancing advice with listening were also features of the good and excellent calls.

Guidance is not just about encouraging callers and the NICEC team found that the best interviews included LLAs challenging callers where appropriate, as in the case of one young man who felt that he had not got as far in his career as he should because he had drifted too often from job to job. The advisor asked *'What makes you think you have changed now?'* which encouraged him to explore what it actually was that made him now want, in his words, *'to buckle down and get serious'*.

On the other hand, there were examples of appropriate absence of judgement where advisors treated disclosure from the client calmly and with interest. Good guidance does not just resolve the immediate choice and the best interviews explicitly demonstrated career planning procedures that the caller could apply in the future. These included exploration of transferable skills and priorities, explanations of tools such as CVs, action planning, and explanations of the advantages of back-up plans, and also discussions of local sources for ideas about the local labour market. Several LLAs gave callers advice about interview techniques that would be relevant for many years to come. NICEC noted that good guidance rests on intelligent listening and from this sample of calls NICEC found that the telephone offered a good medium for that.

Poor calls tended to be shorter in duration

Table 4.14 shows the overall scores of the call recordings by the length of call. There was no clear-cut relationship between call score and the length of the call, although there were no A-grade calls less than 20 minutes long and most A-grades were between 30 and 50 minutes. Equally, poor (D or E grade) calls tended to be shorter.

Table 4.14: Length of calls by overall grade, first LLA calls only

Length of time	A	B	C	D	E
Under 10 mins	–	1	1	–	–
11-20 mins	–	1	7	2	–
21-30 mins	3	11	14	3	1
31-40 mins	10	12	10	1	1

41-50 mins	6	2	5	–	1
51-60 mins	3	–	1	–	–
Over 60 mins	1	2	1	–	–

Source: NICEC analysis of *learnirect* guidance calls, 2006

Female LLAs scores less influenced by the caller's gender

There were 74 calls to female LLAs and 26 calls to male ones. Overall, female LLAs were graded somewhat higher with 54 per cent of female LLA calls graded A or B compared with 46 per cent of male LLA calls. However, it should be noted that the numbers and differences were small and the figures were likely to have been influenced by the fact that the individual LLAs for whom there were the greatest number of calls were mainly female and happened to be particularly skilled.

Table 4.15 shows that the combination least likely to be graded A or B was a male LLA working with a female caller, and conversely that was the combination most likely to be graded C or lower. However, the combination most likely to be graded A or B and least likely to be graded C or lower was the male LLA to male caller (though numbers were low). Although this variation for male LLAs is based on small numbers it may be a point worth noting for training purposes. In summary, female LLAs were graded very slightly higher overall than males, and their performance was less influenced by the gender of the caller.

Table 4.15: Grades by gender of LLA and caller (first LLA calls only) (%)

Grade	LLA Female		LLA Male		Total
	Caller F	Caller M	Caller F	Caller M	
A+B	55	53	38	60	52
C+D+E	45	47	63	40	48
Total	100 (N=42)	100 (N=32)	100 (N=16)	100 (N=10)	100

Source: NICEC analysis of *learnirect* guidance calls, 2006

Scores not linked to caller's employment status or qualification level

Information was available on the employment status of the callers in all but one case. Table 4.16 suggests that the employment status of the caller made little difference to the likelihood that the call would be scored as A or B, or C, D or E suggesting that the service is equally able to deal with clients from a range of backgrounds.

Table 4.16: Grades by employment status of caller, (first LLA calls only) (%)

Grade	Employed/ Self-employed (FT+PT)	Unemployed	Inactive	All calls
	A+B			
C+D+E	50	49	45	48
Total	100 (N=42)	100 (N=37)	100 (N=20)	100

Source: NICEC analysis of *learnirect* guidance calls, 2006

Educational qualification was recorded for 96 callers. Table 4.17 shows that this too made little difference to the quality of the guidance, except that callers with Level 1 or below qualifications were slightly more likely to have a call graded as A or B.

Table 4.17: Grades by educational qualification of caller where known, (first LLA calls only) (%)

	Level 1 or less	Level 2	Level 3+	All calls
A+B	56	53	50	52
C+D+E	44	47	50	48
<i>Total</i>	<i>100 (N=36)</i>	<i>100 (N=38)</i>	<i>100 (N=22)</i>	<i>100</i>

Source: NICEC analysis of learndirect guidance calls, 2006

Call-backs

Assessable call-backs were so few, and generally of such a different nature from the original call, that it was not possible to conclude either whether the evaluation framework was appropriate for use for them, or whether the findings were truly significant. Annex C shows how scores and grades of call-backs clustered.

Only ten of the 22 call-backs could be graded (in the others, the conversation was limited to checking that the caller was on track with plans made in the first call, and so short it was inappropriate to grade them). When LLAs closed the first interview they typically set the agenda for issues to be covered next time (perhaps after some exploration by either the LLA or the caller). In face-to-face best practice, the client can benefit from time in which to gather additional information, but also from a period in which to reflect on what was discussed the first time round. In the five good or excellent call-backs (half of those that could be graded), this is what happened, suggesting that there is potential development here for the service.

The good LLA first interviews in the sample of call recordings all ended appropriately and in keeping with best face-to-face practice, with tasks agreed and a second conversation planned. Calls were rarely cut short inappropriately, and LLAs generally asked if the caller wished to discuss anything else. Some less good interviews did not end with a clear summary of what was discussed, but these were a minority and also occur in face-to-face work.

Equal opportunities

The LLAs in the sample of call recordings were even-handed and free of prejudice. The only problems were perhaps caused by being overly cautious in this respect. For example in the case of one single mother who was considering starting her own business, the LLA failed to raise the question of childcare, and for another caller (also a single mother and who was enquiring about college courses), the LLA did not raise the issues of travel or childcare. Other examples of this included recent immigrants with poor English, and callers where age, dyslexia, or a criminal record might have been significant and who would have been likely to benefit from additional help.

There were occasional examples of a failure of imagination as to what a caller from a culture different to the LLA's own might understand (from overseas or even from different parts of England). In one instance with a recent immigrant an advisor referred to the Yellow Pages and did not seem to pick up that the caller did not understand what this was. On the other hand, many LLAs did explore issues that

might need extra support or consideration. In one interview gentle challenging by the LLA produced important information about the caller's mental health issues.

Currently LLAs are not required to collect information on whether or not a caller has a disability or health problem that would limit their ability to work in some way. Thirteen per cent of respondents to the caller survey identified themselves as having a health problem or disability that would substantially limit their ability to carry out day-to-day activities.

Given the potential value of the service to disabled people, further training, and referral links to the Jobcentre Plus Disability Employment Advisors, could help here. As already noted in section 3.1.3, obtaining information about whether a caller has a disability could be included in the initial information gathering of the IA or LA. Having said this, some LLAs seemed to be handling this well. One interview in the sample of calls led to a referral to a Disability Employment Advisor, and another to the local Connexions service which was able to continue working with people with learning difficulties even after the age of 20.

Summary of quality assessment

On the basis of the evaluation of the 100 available call recordings, the telephone guidance trial demonstrated that guidance can be provided over the telephone to the standard of the best face-to-face practice. Evidence from the call recordings would seem to suggest that **learndirect** guidance was operating reasonably well alongside nextstep, making appropriate referrals where the caller was eligible, but in any case offering a good standard of information about opportunities at a local level as well as in-depth guidance to a professional level.

Fifty-two per cent of calls were graded good or excellent and only nine per cent scored as flawed or poor. Given that the trial was still in its early stages this result is encouraging. There are areas for staff development or minor changes to procedure that could increase the proportion of good and excellent calls, but this is true in face-to-face guidance. As noted elsewhere, the potential for on-going professional development within **learndirect** is greater than in services that lack continuity of funding.

5 The Outcomes of Guidance

5.1 Summary

- There is no agreed set of measures to assess the outcomes of guidance (Maguire and Killeen, 2003) and there are difficulties attributing outcomes directly to guidance since other factors are likely to have an influence (Hughes et al., 2002; Bimrose, 2005).
- Change in employment status between guidance and the research interview was explored. This showed that one-fifth of callers (19 per cent) had gained employment, and amongst those who were unemployed or inactive, the proportion was one-third.
- Self-reported hard outcomes, related to learning and employment, were recorded by two-thirds of the callers. While learning and employment outcomes were reported at much the same rate overall, it was more likely that learning outcomes were attributed to guidance.
- Self-reported soft outcomes, related to changes in attitudes, insight or direction amongst others, were cited by seven out of ten callers. Callers were more likely to attribute these outcomes to **learndirect** than hard outcomes.
- There was some variation in the soft outcomes perceived by callers, with older adults reporting fewer outcomes.
- Throughout the analysis (except in the employment status change measure) there is a strong link between recognition of having created an action plan, the number of guidance sessions received, and outcomes achieved. While the action plan and three-stage model is not currently taken up by substantial numbers of callers, for those that do, it has considerable benefit.

5.2 Measuring the outcomes of guidance

A key question for the evaluation must centre on the outcomes callers believe they have achieved as a result of their interaction with **learndirect** guidance. There are a range of measures to assess outcomes noted in the literature, although as Maguire and Killeen (2003) report there is no agreed set of outcome measures for careers guidance. Watts and Dent (2006) suggest four main types of measure:

- **Client satisfaction** focuses on whether a client has liked the process of guidance. This has been explored in section 4.4.
- **Learning outcomes** are seen to have some merit since they can be measured soon after the guidance intervention and they relate to the process rather than content of the decision. Learning here is broadly viewed and can relate to measures of career maturity (attitudes), knowledge and competence, measures of states and attitudes (career decisiveness), and behaviours.
- **Behaviour outcomes** which relate to actions taken following intervention and the extent of change from behaviour patterns prior to guidance.
- **Economic and social outcomes** including reduced rate of drop out from training or learning, and improved match to labour market requirements. However Watts and Dent (ibid) note that many of these will not emerge until a significant amount of time has elapsed.

This concept of shorter and longer term outcomes is also reported by Hughes et al. (2002) whose categorisation of the outcome measures surround the time elapsed since guidance. In this study:

- **Immediate outcome** measures include increased decision-making skills, opportunity awareness, attitudinal change (increased optimism, sense of control, motivation, willingness to consider alternative options amongst others).
- **Intermediate outcomes** might include improved search strategy, intensity of search, ability to cope with a plan beyond disappointments.
- **Longer term** measures for the individual explore take-up of opportunities, level of attainment, skills match, wages, labour market entry or withdrawal, and progression.

The client survey undertaken for this study had a maximum of three months between guidance and research interview, hence it is the outcomes occurring soon after guidance that have been explored.

Outcome measures for the evaluation

To assess the impact that **learndirect** guidance might have had on service users there are a number of measures explored in the caller survey that can be reviewed, and that link to the themes identified in the literature:

- whether or not users had moved into work in the time between first contact with **learndirect** and the time of interview (change in employment status)
- self-reported learning or career-related activities undertaken as a result of the trial (hard outcomes)
- self-reported changes in psychological factors that may help improve attitudes towards and /or understanding of opportunities available (soft outcomes)
- any activities planned for the future (future plans).

When using these outcome measures to assess the impact of the **learndirect** trial there are a number of issues to consider.

Participants in the trial might be ‘self-selecting’ ie they called **learndirect** in order to get help with their situation. It could be argued that the sort of people who are motivated to make a call might be more likely to make moves to improve their situation and may well have made inroads to this end already.

Another issue is the timing of the survey and the interval between callers’ first contact with **learndirect** guidance and the survey. As there were only three to four months in the interim period there is limited time for callers to achieve certain outcomes, such as getting a job or enrolling on a course. This may be particularly true of learning outcomes since the survey took place in July but many courses recruit seasonally in September or January.

Furthermore, it is difficult to attribute a given outcome to users’ involvement with **learndirect**, particularly as there is no comparison or control group. There is no way of knowing whether a client may or may not have gone into work or started learning regardless of their contact with **learndirect**. However, as part of the survey, respondents were asked to indicate whether an outcome probably or definitely would or would not have been achieved without guidance from **learndirect** in order to give some indication as to the impact the trial has had.

A related problem to that of attributing outcomes to the **learndirect** trial alone is that there may be other factors that affect individuals’ ability to achieve certain outcomes. Hughes et al. (2002) highlight individual and contextual factors that can impact on outcomes such as: gender, age, educational attainment, domestic situation, and local labour market conditions and employer requirements. In addition, Bimrose et al. (2005) cite four barriers to career progression external to guidance interventions: financial constraints, childcare commitments, health issues, and local labour market conditions.

5.3 Changes in employment status

One simple method of assessing employment outcomes of service users is to look at the proportion of users who have gained employment in the time between first contact with **learndirect** and the time of interview. Nearly one-fifth (19 per cent) of callers in our sample had gained employment at some stage between the time of their first call to **learndirect** and the time of the survey interview (Table 5.1). Just five per cent had lost employment during the same period. Nine per cent of respondents to the caller survey were facing redundancy and so it would be expected that they would lose their job in near future; however this may not be a negative outcome if there were good reasons for leaving that particular job.

In terms of shifts between non- or unemployment and work, one-third (32 per cent) of those who were unemployed or inactive at the time of first call had gained employment by the time of the survey. Overall, men were more likely than women to have gained employment since their first contact with **learndirect** (23 per cent compared to 16 per cent) and women were more likely than men to remain unemployed or economically inactive (45 per cent compared to 35 per cent).

Table 5.1: Change in employment status

	%
Gained employment	19
Stayed in employment	36

Remained unemployed/non-employed	41
Lost employment	5
<i>N</i> =	987

Source: IES, 2006 - *learndirect* caller survey

There was no significant relationship between callers who reported agreeing an action plan and those who did not, and entry to employment in the period between first guidance contact and the survey. Other factors such as economic imperative may be more influential than the action plan in this regard. Action planning may influence job change rather than job entry, as whether or not an individual recognised having an action plan was found to be associated with self-reported employment outcomes such as looking for other types of work (see section 5.3.1).

Of the women who were un- or non-employed at the time of first contact with **learndirect**, those who reported that they were looking to return to work after having children were much more likely to have remained out of work than those who had originally called the service for some other reason (91 per cent compared to 66 per cent). While the survey did not explore this issue in any further depth, this finding may be suggestive of a training issue: that in the short term for this group, training to enable return to the labour market may be a pre-requisite of actually being able to do so, particularly with longer duration non-employment. It may also suggest childcare constraints which may mean undertaking an action plan takes longer.

5.4 Self-reported outcomes

The self-reported outcomes from the caller survey can be viewed as two distinct types:

- **Hard outcomes** – employment- or learning-related outcomes that have already occurred or are likely to occur in the future as a result of the **learndirect** trial.
- **Soft outcomes** – less tangible but still important changes in attitudes to work and learning, opportunity awareness, insight, direction and capacity building.

The self-reported hard outcomes include starting to look for work; having alternative career options to consider; working towards a qualification; a training outcome; enrolment on a course; and participation in a training course. Self-reported soft outcomes relate to attitudinal changes, opportunity awareness, insight, sense of direction, and capacity building. The data gathered about both types are discussed in the following sections, beginning with the findings about self-reported hard outcomes.

5.4.1 Hard outcomes

Survey respondents were asked to indicate which, if any, of a number of 'hard outcomes' had occurred as a result of the advice and guidance they had received from **learndirect** (Table 5.2). Nearly two-thirds (62 per cent) indicated that at least one outcome had resulted from their guidance session.

The callers who were most likely to report one or more hard outcomes were:

- **From black or minority ethnic groups** (69 per cent compared to 59 per cent of white respondents).

- **In learning** at the time of first call to **learndirect** (76 per cent compared to 59 per cent not in learning).
- **Intensive users of the service.** Seven in ten callers (71 per cent) who had received three or more sessions indicated that at least one of the outcomes had been achieved. This rate was 65 per cent for callers who had two guidance sessions, and 55 per cent for those who had only one.
- **Callers who reported agreeing an action plan** (74 per cent compared to 50 per cent who did not recognise the action plan).
- **Callers who had completed all their agreed actions** (83 per cent compared to 72 per cent for those starting to complete actions and 60 per cent of those carrying out none).

Table 5.2: Hard outcomes (%)

	% of callers reporting outcome	Definitely/ probably not have happened anyway (ie without learndirect)	Definitely/ probably would have happened anyway (ie without learndirect)	Don't know
Learning outcomes				
Any training outcome*	30	37	59	4
Working towards a qualification	12	31	66	3
Have enrolled on a course	18	38	56	5
Took part in a training course	11	41	56	3
Employment outcomes				
Any employment outcome*	25	28	68	4
Started to look for a job	17	23	76	1
Have alternative career options to consider	17	35	60	9
Changed to a different types of work	8	29	65	5
Offered more job interviews	4	32	57	11

* Reported at least one employment/training outcome

Source: IES 2006 learndirect Caller survey

Table 5.2 shows responses to the questions about hard outcomes and the extent to which these would have been achieved anyway in the belief of callers. The data is discussed in the following sections.

Learning outcomes

The list of outcomes used in the survey included some specifically related to training and learning (see Table 5.2). These included working towards a qualification; enrolment on a course; and participation in a training course. These questions were multi-coded and a variable was created to capture any training or learning outcome, ie one or more responses in this regard, for each respondent.

Just under one-third (30 per cent) of surveyed callers indicated that they had either taken part in a training course, enrolled on a course, or were now working towards a qualification following their guidance intervention. Of these, nearly nine in ten (88 per cent) reported that they had not been learning at the time of their first guidance call.

Responses to a question about whether callers would recommend **learnirect** clearly show that the service had helped increase confidence, and built together the necessary actions for planned participation in learning.

*'I personally didn't think I would get much help and would be a full time mum forever; however as a direct result of speaking to **learnirect** I am now due to start a university course training to be a social worker in September.'*

Female, 26, looking after home or family for more than two years, but less than five years, qualified to Level 3

While this caller indicates how the service has helped one of its target groups, women returners, it was in fact men who were more likely than women to identify they had achieved a learning outcome (34 per cent compared to 24 per cent). Analysis elsewhere (NIACE, 2004) has shown that a higher proportion of males than females were engaged in any type of learning (80 compared to 75 per cent), although these figures do not show solely new learning entrants as reported in the caller survey.

The survey also suggested that older callers were less likely than younger ones to report a training outcome (Table 5.3). Since increasing age is negatively associated with learning participation this perhaps is to be expected (Newton et al., 2005). Analysis has shown, for instance, that beyond the age of 50 there is a rapid decline in participation and, linked to this, lack of training offered to older adults. Research by Ford et al. (2003) shows that older adults are keen to take up training, but face barriers when they try to do so. This decline in participation is clearly present in the **learnirect** data, however, this decline may be considered no worse, and perhaps slightly better, than the national learning participation picture.

Table 5.3: Learning outcome, by age (in %)

If started learning as a result of calls	Under 25 yrs	25-34 yrs	35-49 yrs	50 yrs or older	All ages
Started learning	32	36	28	18	30
Not started in learning	68	64	72	82	70
N =					978

*Source: IES, 2006 **learnirect** caller survey*

Callers who reported a learning outcome were more likely to:

- **Recognise having agreed an action plan** (37 per cent compared to 23 per cent who did not recognise an action plan).
- **Have completed all their actions** (47 per cent compared to 35 for those who had completed some and 28 per cent who had yet to complete any of it).
- **Have had more than one guidance session.** Respondents who had received three or more advice and guidance sessions were more likely than those who had only two or one sessions to report a training outcome (42 compared to 32 and 26 per cent respectively).

The most commonly cited outcome was enrolling on a course, mentioned by nearly one-fifth of respondents (18 per cent). Of these, over one-third (179 callers) reported that they probably (27 per cent) or definitely (11 per cent) would not have enrolled on a course otherwise. However, the converse of this is that up to 60 per cent would have entered learning anyway, regardless of **learndirect**, giving some indication of the strength of deadweight in the sample in this regard.

Respondents who reported enrolling on a course because of the advice and guidance they received from **learndirect** were likely to be:

- **Younger** – one-fifth of the under 25s and one-quarter of 25 to 34 year olds reported enrolling on a course, compared to 16 per cent of 35 to 49 year olds and seven per cent of over 50s.
- **Female** – women were more likely to report having enrolled on a course than men (21 compared to 14 per cent), although overall men were more likely to report any learning outcome.
- **Inactive at the time of first call** – callers who were inactive at the time of the call were more likely to have enrolled a course than callers who were unemployed or in employment (26 compared to 17 and 16 per cent respectively).
- **Intensive users of the service** – 30 per cent of those who had more than three sessions reported enrolling on a course, as did 22 per cent of those who had three sessions, 19 per cent who had had two sessions, and only 16 per cent of those who had only one session.

Employment outcomes

One in four surveyed callers (25 per cent) indicated that at least one of the following had happened as a result of the **learndirect** trial:

- started to look for a job (17 per cent)
- changed to a different type of work (eight per cent)
- offered more job interviews (four per cent).

An example of this was a caller who felt that their guidance experience had led to improved employment outcomes:

‘They were helpful with my CV and I got interviews as a result.’

Female, 20, not in work at time of call, in work at time of survey,
Level 2 qualified

The proportion of callers reporting some employment outcome was higher for those who:

- **Were unemployed** (29 per cent compared to 24 and 20 per cent for non-employed and employed respondents respectively)
- **Were aged between 35 and 49** (29 per cent compared to 25, 19 and 23 per cent for under 25s, 25 to 34, and over 50 year olds respectively).
- **Recognised agreeing an action plan** – one-third, compared to 18 per cent of respondents who did not report agreeing an action plan.

- **Had more intensive support** – one-third (33 per cent) of respondents who had received three or more guidance sessions and 31 per cent of those who had received two sessions indicated that at least one of the above outcomes had occurred, compared to 19 per cent of those who received only one guidance session.

Of the self-reported employment outcomes the most commonly cited was starting to look for a job, (17 per cent). Of these, nearly one-quarter said that they probably would not or definitely would not have started looking for a job without **learnirect**. The converse of this is of course that three-quarters of callers would have done so anyway and we would expect this as many are non- or un-employed at the time of their call. However, the potential deadweight is greater than with learning outcomes and may support notions that other factors are more influential in employment outcomes despite support from **learnirect**.

Surveyed callers who recalled that they had created an action plan were more likely to say that they probably or definitely would not have started looking for a job than respondents who did not report agreeing an action plan (28 per cent compared to 19 per cent). This again supports the intended benefits of action planning which appear to increase the additionality of the service, in this case spurring callers on to look for work.

Respondents from black and minority ethnic backgrounds were somewhat more likely than white respondents to have started to look for a job as a result of the advice and guidance they received (24 per cent compared to 16 per cent). As might be expected, respondents who were un- or non-employed at the time of first call were more likely than those in employment to report starting to look for a job (21 and 18 per cent respectively compared to 13 per cent).

The number of sessions that respondents had with an advisor had a positive impact on the likelihood of callers reporting that they had started to look for a job. Around one-quarter of callers who had three, or more than three sessions had started to look for work (26 and 25 per cent respectively). This is compared to 20 per cent of callers who had two sessions and 14 per cent of those who had one session. This finding supports ideas that an ongoing relationship with the guidance service helps to break down the barriers that may impede progress.

Around one-third of respondents who reported having alternative career options to consider following their guidance experience with **learnirect**, suggested that they would not have considered these otherwise, with one-quarter saying they probably would not and ten per cent saying they definitely would not have done so. While this indicates that two-thirds had already considered any alternative careers they had discussed, the service can still be argued to have had impact in this regard.

5.4.2 Soft outcomes

As well as being asked to indicate which if any of a number of ‘hard outcomes’ had occurred, respondents were asked about outcomes that were less tangible but no less important. In order to assess these softer outcomes respondents were asked to indicate in which, if any, of a number of ways their calls with **learnirect** had changed their attitudes and perceptions towards learning and their career prospects. The possible changes can be seen as falling into five conceptual groups, which were drawn from the literature review and which might be demonstrated in the short to medium term:

- **attitudinal change** – increased confidence or motivation to seek and find work, enter learning, or start voluntary or community work
- **opportunity awareness** – increased awareness of the work and learning options available
- **insight** – better understanding of own skills and abilities, career options, or changed perceptions about suitable work
- **sense of direction** – greater clarity about career direction or how to make changes to career path
- **capacity building** – improved skill to know how to acquire the information and advice needed.

Responses to these questions are shown in Table 5.4 below and discussed in the following sections. Overall however, callers were more likely to attribute the soft outcomes to **learnirect** than they were the hard outcomes discussed above, with around half of the callers with any soft outcome agreeing this was the case. Pollard et al.'s (forthcoming) examination of the longer-term impacts attributed to information, advice and guidance also found that soft outcomes were more likely to be attributed to information, advice and guidance than hard outcomes.

Attitudinal change

Close to one-quarter of surveyed callers (23 per cent) indicated that they felt more confident about their ability to do some learning. Just under one-fifth indicated that they were either more motivated to look for work (19 per cent), or felt that they were more confident in their ability to get a job (18 per cent). The work with an advisor had increased the confidence of callers, and there is a clear sense of the value of working one-to-one to build this to achieve work and learning outcomes. Callers noted they would recommend the service because of this.

'They really helped boost my confidence. I was feeling quite low and they really put the effort into helping me with my CV.'

Female, 42 out of work for five years or more, Level 2 qualified

'Because they were so helpful, and they helped raised my confidence and belief in my ability.'

Female, in work, Level 2 qualified

This increased confidence was not limited to the options discussed in the guidance call: it also appears to be strongly linked to ideas of building the capacity of callers to find their own solutions, an issue that is explored in the section below.

'They were very helpful, even though I have now changed from being interested in the travel industry to being a beautician; they have made me feel more confident in myself and what I'm capable of.'

Female, 36, in work at time of call, out of work at time of survey, no qualifications

For soft outcomes, half of callers reported that they would have happened anyway. However, there are some slight variations (Table 5.4). Just over half of the callers (49

per cent) who had indicated that they felt more confident in their abilities would not have done so without **learndirect** guidance.

Opportunity awareness

Nearly one-third (32 per cent) of respondents indicated that they felt more aware of the training or learning options available to them, and just under one-quarter (24 per cent) of callers said they felt more aware of the job options that were available to them. Of the respondents who indicated that they felt more aware of their training options 47 per cent suggested that this probably or definitely would not have happened otherwise. A higher proportion of respondents who indicated that they felt more aware of their career options as a result of their calls to **learndirect** said that this would not have happened otherwise (55 per cent). This is to some degree surprising since callers were more likely to attribute self-reported hard outcomes related to learning to the service rather than employment outcomes overall.

Insight

Over one-quarter (28 per cent) of respondents indicated that they had a better understanding of their career options because of the advice and guidance they had received. A smaller proportion reported either a better understanding of themselves and their skills (17 per cent), or changed perceptions of the work that might suit them (15 per cent). In terms of whether this had resulted from the call(s) 49 per cent attributed their improved understanding of their career, or of themselves and their skills to **learndirect**. A slightly higher proportion (51 per cent) attributed changed perceptions of suitable work to **learndirect**.

Table 5.4: Self reported soft outcomes (%)

	% of callers reporting change	Definitely/ probably not	Definitely/ probably	Don't know
Attitudinal change				
I am more confident about my ability to do some learning	23	49	47	4
I feel more motivated to look for work	19	48	51	1
I am more confident in my ability to get a job	18	49	48	3
I am more confident about doing some voluntary/community work	11	52	44	4
Opportunity awareness				
I am more aware of the training/learning options available to me	32	47	47	6
I am more aware of the job options available to me	24	55	43	2
Insight				
I have a better understanding of my career options	28	49	48	4
I have a better understanding of myself	17	49	50	1
I have changed my perceptions of the work that is suitable for me	15	51	46	3
Sense of direction				

I am clearer about what I want to do with my career	26	47	49	4
I know what I need to do to make changes to my career	22	46	51	3
Capacity building				
I am better at getting the information and advice I need for myself	19	46	52	3
None of the above	29	n/a	n/a	n/a

N = 1,001

Source: IES, 2006

Insight was also identified by callers when asked about why they might recommend **learndirect**. As the quotes below indicate, callers appreciate the chance to develop some insight into their skills and interests with an advisor as this helps to identify opportunities not previously considered.

'I think it makes you think more, gives you your options.'

Male, 57, out of work for one year or more, but less than two years, no qualifications

'They were very broad and they have encouraged me to look down avenues that I never thought I could.'

Female, 39, in work, Level 4 qualified

Sense of direction

Over one-quarter (26 per cent) of respondents indicated that they felt clearer about what they wanted to do with their career, and just over one-fifth (22 per cent) felt that they now knew what they needed to do to make changes to their career. However, this was less attributable to **learndirect** guidance than other outcomes (Table 5.4).

Capacity building

Just under one-fifth of callers (19 per cent) indicated that they were now better at getting the information and advice that they needed for themselves. An example of impact in this regard is drawn from a response to why a caller would recommend the service, and it is clear that this caller felt better enabled to source information as a result of their call.

*'Prior to ringing **learndirect** I was struggling trying to sift through websites and find the relevant information to my situation. **learndirect** put me on the right path straight away and gave me the right websites and resources to use for my personal situation.'*

Female, 41, not in work, Level 3 qualified

No soft outcomes

Three in ten of the surveyed callers (29 per cent) indicated that they had not experienced any of the identified positive outcomes. These respondents were much more likely than those identifying positive soft outcomes, to report that they had not

agreed an action plan (40 compared to 15 per cent). Since all the callers in the survey were logged as creating an action plan, this finding points to the importance of them recognising this to be the case.

5.4.3 Future plans

As well as asking callers about tangible outcomes from their guidance experience, respondents were asked to indicate what, if anything, they planned to do in the future. This was particularly important given that the survey took place in July, only three to four months after callers first call to **learnirect** and that many courses may not start until later in the year (eg September/October) and so findings in this regard might under-estimate effect.

It should be noted that there may be an interviewer effect in the results to some extent as respondents might see it as socially desirable to intend to carry out some of the actions in the future. If this were the case, it would mean that individuals report that they are likely to take some action in the future, perhaps with regards to their work or learning situation because they believe that this is what the interviewer wishes to hear. Secondly, intentions should not necessarily be seen to lead to actual behaviour; the theory of planned action (eg Ajzen, 1985) shows that intentions alone are not enough to predict behaviours and there are other factors involved that determine whether or not actions are taken. However, intentions remain an important part of the overall picture and are often the first step on the road to achieving positive outcomes.

Three-quarters (76 per cent) of all respondents indicated that they planned to carry out at least one of the listed employment or learning activities in the future. The most commonly cited planned activities are detailed in Table 5.5. Respondents who had previously indicated that they had already made a change as a result of their guidance sessions were slightly more likely than those who had not, to indicate some planned action in the future (79 per cent compared to 72 per cent). This suggests ongoing engagement with the action plan, a conclusion that is supported by the earlier finding (section 4.3.2) that half of respondents were part-way through their action plan at the point of survey.

Table 5.5: Planned activity

Planned activity	% of respondents planning the activity
Take part in a training course or to work towards a qualification	32
Get a job or start looking for one	22
Change to a different type of work	11

Source: IES, 2006

Callers who were non-employed at the time of first call were more likely to indicate that they were planning to look for or get a job than those who were unemployed (30 compared to 22 per cent). However, the analysis of outcomes indicated that unemployed individuals were slightly more likely to report seeking work as an outcome of guidance than non-employed people and, it might be assumed, were more likely to be doing so anyway because of unemployment benefit regulations. It may be the case that the non-employed callers still have confidence barriers to overcome (since they have not yet taken action in this regard) or that they are involved in interim activities such as training that will better position them in the labour market.

Those most likely to indicate that they planned to train were:

- **younger** – 39 per cent of under 25s, compared to 20 per cent of people aged over 50
- **had Level 1 qualifications** – 38 per cent, compared to 21 per cent of those qualified above level 3
- **from BME groups** – 44 per cent, compared to 29 per cent of white callers
- **were female** – 35 per cent, compared to 27 per cent of males
- **recognised agreeing an action plan** – 38 per cent, compared to 27 per cent of those who did not.

5.4.4 Overall influence of learndirect

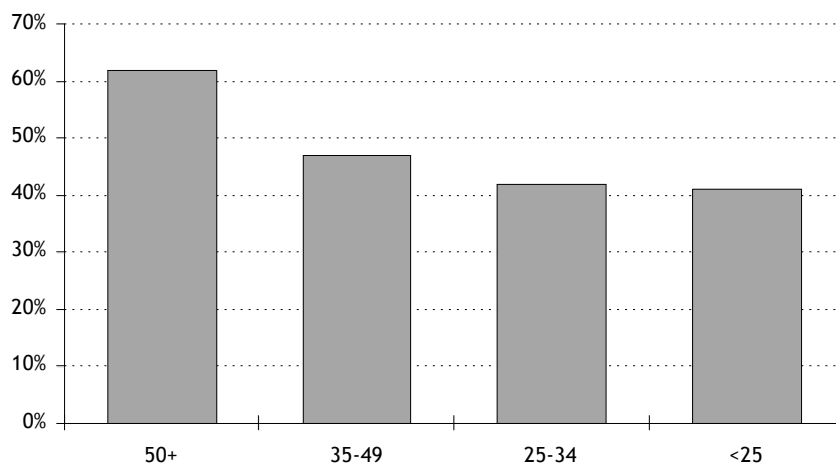
In order to get an idea of the overall influence **learndirect** had on callers' career and learning situations, respondents were asked how influential the advice and guidance they had received had been and whether they had received advice and guidance from any other source.

When asked how influential **learndirect** advice and guidance had been in making decisions about their career just over half (52 per cent) suggested that it had been a significant influence or quite a big influence. This proportion was higher for respondents who reported having agreed an action plan than for those who did not (64 compared to 46 per cent).

Callers who were most likely to report being influenced by **learndirect** were:

- **in learning** at the time of first call (65 compared to 53 per cent who were not in learning)
- **qualified to Level 1 or Level 2** (both 59 per cent). Those with Level 3 qualifications (52 per cent) or no qualifications (50 per cent) were less likely to report that **learndirect** had influenced them in some way. Only four in ten (44 per cent) of those with Level 4 or higher qualifications cited **learndirect** as an influence
- **younger** (see Figure 5.1).

Figure 5.1: Percentage of callers reporting that learndirect was little or no influence, by age



Source: IES, 2006

It has been found elsewhere (Tyers and Sinclair, 2005) that advice and guidance service benefits were not as great for people aged over 50, and this is an issue that would benefit from further exploration. Ford et al. (2003) found that there were many barriers stopping individuals aged over 50 participating in learning, including poor advice.

5.5 Summary of outcomes

Some key messages have arisen from the outcomes analysis. Shifts in employment status have to be treated with some caution, since the extent to which this can be attributed to guidance alone is debatable. Other factors are likely to affect outcomes in this regard including gender, age, employment status and labour market conditions (Hughes et al., 2002; Maguire and Killeen, 2003).

Seven out of ten callers reported soft outcomes. However, half reported that these would have been achieved anyway. The most common soft outcome reported related to awareness of learning options, although this was slightly less attributed to **learndirect**. Greater awareness of job options was a less frequently cited outcome, however, callers were more likely to say it had resulted from guidance. The most prevalent attitude change was increased confidence in ability to learn.

There are some differences in soft outcomes by age noted in the analysis of overall influence of **learndirect**. This replicates findings elsewhere (Tyers and Sinclair, 2005) about guidance and older adults.

Research into older people's expectations of guidance, and the types of issue that they would like help with would be beneficial.

Throughout the analysis, there is a clear link between recognition that an action plan had been agreed as part of the guidance call and outcomes, and between the number of sessions and outcomes achieved. This supports the notion of a three-stage model, with the action plan created in the first call and then worked on subsequently. For those who take-up the full service, there is a greater likelihood that they will report that outcomes resulted from their guidance intervention.

6 Cost-Effectiveness Analysis

6.1 Summary

- The key aim of this analysis is to establish broad parameters of the affordability of providing **learndirect** guidance. The understanding of the findings must be informed by whether the service is seen to have provided guidance to a new market (additionality), or whether the trial is judged to have served the existing guidance market (deadweight). The evidence suggests the former proposition to be the case.
- The analysis of costs is based on a comparison of **learndirect** guidance with nextstep advice and enhanced services. The content of the two services are different, thus it must be acknowledged that it is not a 'like with like' comparison.
- nextstep clients are lower qualified and / or more frequently unemployed than **learndirect** clients. Evidence elsewhere suggests that disadvantaged groups require greater support. This is likely to have cost implications for nextstep.
- Intermediaries are important to nextstep, generating two-thirds of their clients. In the case of **learndirect**, they generate one-third of all calls.
- Marketing spend is currently very different between the services and generating demand for the new **learndirect** guidance service has been expensive. This has significant impact in the cost-effectiveness analysis.
- The rate of action plan take-up in nextstep advice and enhanced services is twice that of **learndirect** guidance (60 per cent compared to 30 per cent).
- Based on actual costs, the cost per session is much the same for nextstep advice and enhanced services, and **learndirect** guidance services.
- When costs of the supply of guidance *only* are considered, **learndirect** is more cost-effective on all measures except in terms of action plans, where both services are equally cost-effective.
- **learndirect** costs included set-up costs and costs of raising brand awareness. Over time, telephone guidance may become more cost-effective.
- Overall, this evidence suggests that the **learndirect** is operating within the bounds of guidance costs elsewhere and is likely to become more cost-efficient over time.

6.2 Exploring the cost-effectiveness of telephone guidance

Face-to-face guidance has been seen as expensive and labour-intensive, however, it also remains the current dominant model for guidance delivery (OECD, 2004). To extend access to guidance the OECD report suggested that innovative alternatives to delivery may be required to control the impacts on public expenditure. Such alternative delivery mechanisms might include telephone and ICT-mediated guidance or some blending of these, and further blending of ICT with more traditional face-to-face approaches.

At the present time, there is a lack of information about how effective and efficient the different forms of guidance are (Watts and Dent, 2006). These authors suggest that telephone-based interventions are likely to be shorter in duration than face-to-face guidance ie requiring less staff resource. Further to this, these authors suggest that the associated technologies, such as caller queuing facilities, may well lead to the more efficient use of staff time. In the following analysis we set out to explore how **learnirect** and nextstep compare on the basis of costs, with the aim of supplying some data upon which some early judgements may be drawn between telephone and face-to-face approaches. A key question in assessing and understanding costs is whether **learnirect** provides additionality to the guidance market by working with clients who would not otherwise enter the system or, instead, diverts clients from face-to-face services (section 6.2).

Overall, the aim of the cost-effectiveness analysis is to use the available financial information from nextstep and **learnirect** to assess the cost-effectiveness of telephone compared to face-to-face guidance. However, it must be noted that the two services compared in the following analysis are different in approach and therefore it is not a 'like for like' comparison. nextstep offer two levels of service: 'advice' and an 'enhanced' service, both of which can involve an action plan. It is not clear which of these provides the best match with the **learnirect** guidance trial and in the analysis presented in this chapter both groups are considered in the nextstep costs. There is more 'advice' in the mix of costs presented for nextstep than for **learnirect** which focuses solely on guidance.

6.3 Discrete alternatives or complementary services?

Overall 246,000 people accessed the nextstep service in the period between January and July 2006, and of these 93 per cent used the advice service (229,000 users) while seven per cent entered into the enhanced guidance service (17,000 users). If **learnirect** guidance, and nextstep advice and enhanced services are considered to be the total national population of guidance providers then nextstep handled 84 per cent, while **learnirect** delivered 16 per cent. In reality, however, there are a wide variety of guidance providers including FE colleges and trade union learning representatives that are not considered in the following analysis.

However, as take-up of nextstep has not been affected by the introduction of the telephone trial (section 3.2), the introduction of the **learnirect** telephone guidance service has generated an additional 19 per cent to the user base of guidance services in England. This analysis is supported by the **learnirect** caller survey which found that more than eight in ten callers were new to guidance (section 3.2.1). This suggests that **learnirect** and nextstep are working as discrete alternatives with largely different client groups. It may be that where overlap occurs between the **learnirect** population and the nextstep target population, it represents a preference on the caller's part for telephone guidance (although data was not available to the evaluation that would

allow exploration of this). Certainly, **learndirect** advisors reported that callers who are qualified to below Level 2 were likely to be referred to nextstep as part of the screening process prior to referral to an LLA. Further, if the caller chooses to continue with telephone guidance they might equally be referred to nextstep as part of their action plan.

6.3.1 Comparison of client characteristics

Men most frequently take up the nextstep service, and the participation of women in enhanced services was five per cent lower than their proportion of advice service users (Table 6.1). The reverse is true of **learndirect** (Table 3.3) whereby the proportion of women is above population estimates for all callers, and increases by three per cent amongst action planners. To contextualise this point, it has been shown that women are more likely than men to use telephone helpline services (Watts and Dent 2002).

Around one-quarter of users of either of the nextstep services (ie advice or enhanced services) were employed; more than six in ten were unemployed and the proportion of unemployed increased by over three per cent in the enhanced service user group. Around one in ten of the advice service users were either non-employed or reported some 'other' work status and this proportion decreased by three per cent in the enhanced service user population (Table 6.1). Employed people are more likely to use the **learndirect** service (Table 3.3). Their representation in the caller population is twice that in the nextstep population (some skew in this regard would be expected in light of nextstep's target users).

The large majority of users of either of the nextstep services were qualified below Level 2; again this would be expected given the targets for this service. Fewer than four in ten of all callers to **learndirect** are qualified to below Level 2, while their proportion is over 90 per cent in the nextstep population.

Table 6.1 suggests that there are considerable differences between the client groups for nextstep and **learndirect** and, as might be expected, these relate to nextstep targets. However, it is not the case that **learndirect** does not reach these groups: as noted earlier (see Table 3.3) 36 per cent of callers are qualified below Level 2.

Table 6.1: Characteristics of nextstep service users

	Advice service		Enhanced service	
	N	%	N	%
Gender				
Female	106,983	46.7	7,053	41.0
Male	12,2203	53.3	10,135	59.0
Age				
> = 19	1,181	0.5	52	0.3
20-24	47,797	20.9	3,339	19.4
25-49	143,038	62.4	11,161	64.9
< = 50	37,170	16.2	2,636	15.3
Work status				
Employed/self-employed	59,255	25.9	4,310	25.1
Unemployed/non-employed/other	169,931	74.2	12,878	74.9

Highest qualification				
Other	1,675	0.7	104	0.6
Below Level 2	209,308	91.6	16,088	93.8
Level 2	7,912	3.5	566	3.3
Level 3	4,593	2.0	195	1.1
Level 4 and above	4,939	2.2	235	1.4

Source: Nextstep MI, 31 August 2006

Tyers and her colleagues (2003) suggest that clients from disadvantaged groups are likely to require more guidance sessions and greater support, both of these indicating higher costs for the supplier. The users for nextstep may be considered more disadvantaged than those of **learndirect** since, generally, they are lower qualified and more likely to be unemployed. This has not been factored into the following assessments (since data was not available that would allow an appropriate weight to be calculated) but this is likely to be a consideration in understanding the results of the cost analysis.

The evidence largely suggests that nextstep and **learndirect** deliver guidance to different groups of users. **learndirect** has generated interest in guidance from groups who were previously not accessing it, and thus its cost-effectiveness should be viewed in terms of generating and delivering guidance to a new market.

There are some further differences between **learndirect** and nextstep that we discuss in the sections below. These do not relate specifically to the client groups and so do not impact on the above conclusion. However they do affect the costs of the services and the calculations for the cost-effectiveness measures.

6.3.2 The role of intermediaries

Overall, two-thirds of nextstep advice users were referred to the service by another organisation, and the source of their referral is shown in Table 6.2. This compares to one-third of all **learndirect** callers (Table 3.1). Jobcentre Plus is a key source, referring around one-third of nextstep advice clients. 'Other intermediaries' such as **learndirect**, Business link, Connexions and the Probation service, were the source of small proportions of clients. Together, these intermediaries account for around 14 per cent of advice clients. **learndirect** provides just one per cent of these referrals.

The nextstep management information records which organisation clients have been referred to following an IAG session, and this includes **learndirect**. This shows that around one in ten clients were referred to **learndirect** during their advice session; while six per cent were referred to **learndirect** during their enhanced service session. It must be noted that data on the extent of take-up of referrals from nextstep guidance was not available, but it is likely to be a smaller proportion than all those referred. The management information analysis for **learndirect** recorded that fewer than one per cent of callers (and action planners) were referred by nextstep. However, by these measures nextstep makes a greater number of referrals to **learndirect** than it receives.

Table 6.2: Source of referrals to nextstep

Referrer	Advice		Enhanced	
	No	%	No	%

Other	64,631	41.9	5,111	40.6
Jobcentre Plus	53,076	34.4	3,788	30.1
Other intermediary	21,952	14.2	2,829	22.4
Education provider referral	14,535	9.4	874	6.9
<i>Total</i>	<i>154,194</i>		<i>12,602</i>	

Source: Nextstep MI, 31 August 2006

Differences in the marketing spend

The two services have very different approaches to marketing, and the budget available for marketing to each varies considerably (Table 6.5). **learn**direct has a sizeable budget which it spends on a variety of media, and has used to develop and broadcast the jigsaw creative. The budget available to nextstep is a very small proportion of that of **learn**direct. This may, in part, explain the importance of intermediaries to the service, although the maturity of the service may also mean that intermediaries are better informed of its availability and more active in referring to nextstep.

Assessment of the **learn**direct marketing spend showed that within the period under examination, marketing costs were considerably higher than for the quarterly mean across the year. The actual cost within the period was £950k while the quarterly mean was £540k. This suggests that the actual quarterly marketing spend includes some early set-up costs. An alternative analysis is presented later in this section that factors this in. The actual and mean quarterly marketing spend for nextstep were also compared and indicated no great difference.

6.3.3 Action plan take-up

In the case of the nextstep advice service 64 per cent of clients took up an action plan, whereas for the enhanced service the proportion was 58 per cent. Therefore, the proportion of either type of client taking up the action plan is over 60 per cent in nextstep. The equivalent proportion in the **learn**direct population is 30 per cent.

6.4 Cost-effectiveness of the guidance trial

At the outset it was agreed that a comparison would be drawn between the costs of its delivery with those of nextstep advice. The services are different and there is debate about which of the nextstep services provides the most useful base for comparison with **learn**direct guidance. In practice, it was not possible to isolate the costs of the nextstep enhanced service from its advice service thus the basis of the cost data includes both. Therefore the level of service provided by nextstep may be at a different level to that provided by **learn**direct, although no direct comparisons are available.

6.4.1 Developing the cost effectiveness indicators

Assessments of cost-effectiveness usually follow a formula of 'measure' over input costs, and the choice of 'measure' units varies. Hard outcomes (such as entry to employment) may be preferred since the value of such gains is more easily clarified within the economic context. However, these types of outcomes will depend very

much on the economic context in the locality of the individual, and on the labour market position and human and/or social capital of the individual.

Watts and Dent (2006) use the number of clients advised by the service for their analysis. This provides a simple throughput cost per client. These authors also suggest the number of clients from target groups can be used as a measure of throughput.

For the current analysis, the literature combined with considerations of the available and comparable information across both services suggested the following measures for comparison (see Table 6.3). Cost per guidance session provides a through-put measure, as does the action plan indicator. Hard outcome measures include costs associated with job entry or entry into learning. A final indicator isolates the input marketing costs for an assessment of the cost-effectiveness of generating demand.

Given these differences, the most equitable indicator to assess costs has to be throughput measures. Of these, the cost per guidance session is the most reliable since the take-up of action plans varies considerably between the services and it is not clear what accounts for this. If **learndirect** could increase the take-up of action plans to the level achieved by nextstep, the findings on this indicator would improve significantly.

Table 6.3: Cost-effectiveness and source for number of service users

Indicator	Data source
Cost per 'guidance' session	Management information
Cost per action plan created	Management information
Cost per job entry	Caller survey (LD); Impact report (NS) MTL (2006)
Cost per entry to learning	Caller survey (LD); Impact report (NS) MTL (2006)
Cost of generating demand (ie marketing spend per client service user)	Management information

Source: IES, 2006

The number of service users has been calculated for the seven month period between January and July 2006. Calculations used in the cost-effectiveness indicators are based on three-sevenths of these numbers to arrive at an estimate for quarterly take-up. This makes some allowance for seasonal differences in uptake.

For **learndirect** the data source for the outcome measures of cost-effectiveness is the caller survey. This subset of the population was representative of the action planning population who called between January and April 2006 although, as noted, presents some differences with the overall **learndirect** caller population by the end of July 2006.

For nextstep, the outcome data is drawn from its Impact Report (MTL, 2006) (Annex D). The surveyed nextstep population varies from its wider user population (although it was not an intention of this study to produce a representative sample) in the following ways: women are over-represented (by close to 20 per cent), as are people who are employed (by 12 per cent). Users who are qualified below Level 2 are under-represented by 30 per cent.

The mean value per client (or outcome) is considered for both services, and this overlooks that different clients have different needs which result in different costs. Should the client base for either service change, it is likely that this would impact on the costs of provision.

Choice of financial cost time-period and issues with cost data

Costs associated with the period from 1 April to 30 June 2006 were selected in an attempt to isolate the impact of initial set-up costs for **learndirect** and provide a more equivalent basis for comparison with nextstep. Budget data was not available for two nextstep services. To make allowance for this, twice the mean costs associated with the remaining 45 nextsteps were added to the total costs. The data available for one LSC area indicated that VAT was included in their figures. The other LSCs did not indicate whether this was also the case for their figures.

In addition, the interviews with the nextstep contract managers identified that core funding did not take account of local conditions and that, for instance, costs for providing the service were deemed to be the same for London as for other areas. Further, the funding for clients also depended on who 'owned' the nextstep provider since VAT applied to some organisations (eg private companies) but not to others (eg local authorities).

Coverage of direct and indirect costs for both services

In the case of nextstep, direct costs associated with delivery are a fixed unit price for advice and a fixed unit price for enhanced services. The fixed unit price varies between areas. Indirect delivery costs cover: management including the management of sub-contractors; administration of any contractor's non-delivery activities; accommodation of non-delivery staff; telecommunications; human resource management of contractor staff; finance of the contract; staff development; development, coordination and operation of **learndirect** referral points; coordination and quality assurance of local **learndirect** portal content; marketing materials; service quality assurance; impact analysis and evaluation of contractors.

For **learndirect** staffing costs, marketing, research and professional fees, advisor costs, systems/line rental and call costs are included. A clear difference between the two sets of costs is that **learndirect** does not specify its management or administration costs under a separate budget header, instead it wraps these up under its main budget lines. A further issue is that nextstep costs seem to include some aspects of the **learndirect** service (referral points and portal) which both services use.

Effect of other funding streams on nextstep costs

nextstep provide a range of information, advice and guidance services, many of which are funded by sources other than the national Learning and Skills Council. There was some indication in the interviews with nextstep contract managers that the funding available from other sources might be used to cross-subsidise (and vice-versa) the LSC funded provision, particularly with regard to management and overhead costs. Funding from other sources varied considerably at local level. Only ten of the 47 LSC areas contributed to this aspect of the evaluation, so other sources of funding are likely to exist. In the areas from which the interviewed contract managers were drawn, the funding sources in Table 6.4 were identified. Some nextstep providers also charged service users directly.

It is not possible, because of the variability of this funding at the local level, and the lack of an evidence base for the degree of cross-subsidisation between sources, to factor the effect of other funding sources into the cost-effectiveness analysis.

Table 6.4: Examples of other funding in the nextstep local areas

Funder	Example funding streams
European Social Fund (ESF)	IAG to unemployed people, aged between 16 and 24 qualified to any level; or to those aged over 25 who have been unemployed for over six months IAG to specific geographic areas or range of target groups eg employed part-time (under 16 hours per week) 'Discover skills for success' Localised funding to build capacity in voluntary sector to deliver IAG in SMEs IAG for older adults IAG for people in prison
Aimhigher	IAG for those not covered by core nextstep contracts
Local Learning and Skills Council (LLSC)	IAG for people qualified above Level 2 Skills Coaching Pilots IAG to unemployed and inactive adults Train to Gain IAG to workers below/Level 2 Employer Training Pilot (outgoing) as above
Private Business	Contract with a multi-national company to provide IAG and training for workers

Source: IES, 2006

6.5 Presentation of cost-effectiveness indicators

The total budget for the **learndirect** guidance trial was £12 million exclusive of VAT and £14 million inclusive of VAT. With an initial target of 100,000 guidance service users over the 18 month period this implies that the proposed cost per guidance session (including all the set up costs associated with the trial) would be £120 (excluding VAT) or £140 (including VAT). As discussed above, a three-month time period has been chosen in which to measure and discuss cost-effectiveness.

Table 6.5 shows the bases for analysis. In the three month April-June 2006 period, the costs of offering the nextstep advice and enhanced services were four times greater than those for **learndirect**. However, in this period it supplied its services to five times as many clients as **learndirect** guidance.

6.5.1 Analysis of cost-effectiveness based on actual costs

All figures have been rounded to the nearest £10 in the following analyses. The lighter shading in the tables indicate where cost-effectiveness may be considered broadly equivalent in both services, the heavier shading indicates that one service is more cost-effective than the other.

Table 6.5: Base of costs and number of service users (April-June 2006)

	learndirect (actual)	nextstep (budget)
<i>Total costs</i>	£1,872k	£8,789k
Marketing costs	£955k actual £534k quarterly mean	£224k actual £214k quarterly mean
Costs excluding marketing	£1,338k	£8,565k
No. all clients	19,856	105,589

No. action plans created	5,983 all users 3,311 eligible users	63,353 all users 58,934 advice service users
Percentage entering work	19	15
Percentage entering learning	30	45

Source: IES, 2006, based on Financial and management information, *learndirect* and *nextstep*

Table 6.6 presents the cost-effectiveness indicators for each service in the April-June 2006 quarter based on all actual spending in the case of **learndirect** and all budgeted spending in the case of *nextstep*. In this analysis the costs per guidance session are much the same for both services.

Table 6.6: Cost indicators for three month period (April-June 2006) - based on all spending

Indicator	learndirect	nextstep
Cost per 'guidance' session	£90	£80
Cost per action plan created	£310	£140
Cost per job entry	£500	£560
Cost per entry to learning	£310	£190
Marketing spend per client	£50	£0*

* Actual spend per client was less than £5 ie rounded to zero

Source: IES, 2006

In this analysis action plans cost considerably more through **learndirect**: £310 compared to £140 for *nextstep*. If **learndirect** were able to increase the take-up of action plans to the same proportion of users as *nextstep* (ie 60 per cent) this indicator would reduce to £160. The costs per entry into learning through *nextstep*, at £190, are also considerably lower than for **learndirect**, at £310, but may be affected by the time of year when the *nextstep* user survey was undertaken.

The much lower spend on marketing by *nextstep* makes it by far the more cost-effective service by this indicator, indeed, the indicator shows overall that this amounts to no marketing spend per client. As *nextstep* works with partners to gain referrals and undertakes outreach work to gain clients, spending of this type is likely to be captured under staff costs rather than marketing; therefore this indicator is not likely to reflect the full cost to *nextstep* of generating demand.

6.5.2 Analysis of cost-effectiveness based on quarterly mean of marketing costs

This second analysis (Table 6.7) attempts to minimise the effects of set-up costs for **learndirect** guidance during this time period, where actual marketing costs were some £400k greater than the quarterly mean of marketing costs. The analysis also presents the quarterly mean for *nextstep*; however the difference is less extreme with the quarterly marketing spend being approximately £10k under the actual marketing spend.

Table 6.7: Cost indicators for three month period (April-June 2006) - based on quarterly mean marketing and all other actual spending

Indicator	learndirect	nextstep
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Cost per ' guidance' session	£70	£80
Cost per action plan created	£240	£140
Cost per job entry	£390	£550
Cost per entry to learning	£240	£190
Marketing spend per client	£30	£0*

* Actual spend per client was less than £5 ie rounded to zero

Source: IES, 2006

As before, the cost of a guidance session is broadly the same for both services although **learndirect** becomes slightly cheaper than nextstep in this analysis. The cost of an action plan remains the same for nextstep. However, for **learndirect** the cost per plan decreases by £70 to £240, but remains around £100 more expensive than nextstep. As in the previous analysis, a calculation was made as if **learndirect** action plans were taken up at the same rate as nextstep. This reduces this indicator in this analysis to £120 per client per action plan created.

The impacts on the cost per job entry are more significant. By this measure, **learndirect** becomes considerably cheaper than nextstep. The cost on this measure for nextstep remains much the same as for the previous analysis. The effect is similar for entry to learning, with **learndirect** unit costs decreasing. However, although nextstep costs on this indicator remain largely unchanged, it still provides a more cost-effective service.

6.5.3 Analysis of cost-effectiveness solely for supplying demand

Since the differences in the amounts spent on marketing between the two services are extreme, this final analysis (Table 6.8) presents costs relating solely to the supply of guidance, excluding marketing costs for both services.

The cost per guidance session for **learndirect** drops by £20 when compared to the analysis presented immediately above (Table 6.7). By this measure, cost per guidance session is cheaper through **learndirect** by some £30 when compared to nextstep.

Table 6.8: Cost indicators for three month period (April-June 2006) - actual marketing costs excluded

Indicator	learndirect	nextstep
Cost per ' guidance' session	£50	£80
Cost per action plan created	£150	£140
Cost per job entry	£240	£540
Cost per entry to learning	£150	£180

Source: IES, 2006

The cost of creating an action plan becomes broadly the same between the services, although nextstep is marginally cheaper. If **learndirect** increased take-up of action plans to 60 per cent, as nextstep currently achieves, this would reduce their costs per client in this regard to £80. **learndirect** is more cost-effective than nextstep for both outcome measures in this analysis.

6.6 Is learndirect cost-effective?

6.6.1 Generating new demand is expensive

The two services are not at an equivalent stage of development. The newly introduced **learndirect** service has been concerned with raising its profile while nextstep is more established. Whether the marketing costs of nextstep reflect its marketing budget at the outset of its delivery has not been explored.

The media selected by **learndirect** for marketing has specific implications. While television advertising offers the opportunity to reach a very wide community, it also has huge implications on the extent of spending since it is costly both to develop and broadcast adverts.

The 'best' estimate suggests that each new client generated by **learndirect** required a marketing spend of £30, while nextstep has had to spend very little to maintain its supply of clients. However, there will be some cost in terms of time and resources attributable to the referral process that this evaluation is not able to capture or estimate.

An issue for policymakers to consider is whether **learndirect** will require this level of spending throughout its lifetime to generate clients for the service. A further consideration must be whether the 20 per cent increase in the numbers of clients accessing guidance nationally as a result of the introduction of **learndirect**, makes this marketing spend worthwhile.

A question raised by this is whether the generation of demand would be made more effective if both services operated beneath the same brand. There were indications from the nextstep contract managers that they felt the separate marketing of **learndirect** had been an opportunity lost. Without a shared brand joined-up working was felt to be more difficult and led to a less seamless experience for guidance clients. The separate campaign also meant that without its own equivalent marketing budget, nextstep had been unable to benefit from the spending in this regard.

6.6.2 Costs compare with evidence on the costs of guidance elsewhere

An initial question arising out of this analysis is how far the cost findings presented above fit with what is known about the costs of guidance from other sources. In their study, Tyers and colleagues (2003) found that the spend per client varied considerably between pilot centres from £100 per session to over £2,000, but that the average cost of guidance per client was £220. Against this background, **learndirect** guidance and nextstep can be viewed as cost-effective since in each case the cost of guidance is less than £100. However, it is important to note that the pilot evaluated by Tyers and colleagues aimed to supply guidance to disadvantaged groups such as people with disabilities or learning difficulties, people with basic skills needs, refugees and asylum seekers, and offenders. A key finding was that the needs of these groups were greater and that this was likely to result in higher guidance costs.

The nextstep contract managers gave information about 'per client' funding to subcontractors at the local level. This was a fixed price, with advice sessions reported to attract between £35 and £50 per client, and enhanced sessions attracting between £50 and £70. One contract manager reported that different subcontractors might attract higher levels of funding, for instance, the probation service received more than £50 per client for advice sessions because of the nature of the client group, while

Jobcentre Plus had received less because of the ease with which they would gain referrals.

While neither source of evidence provides a satisfactory base from which to compare the costs of nextstep and **learndirect**, both suggest that the costs findings are within the bounds of costs for guidance found elsewhere.

6.6.3 Interpreting cost-effectiveness

The cost-effectiveness findings have presented three ways of looking at the differences (and similarities) between the costs of the **learndirect** and nextstep services. However, which of these presents the best set of indicators, is to some degree, a matter of choice. Whichever approach is accepted, the difficulties outlined about the 'input' data require consideration. In addition, the extent to which the services work with different client groups, and how far the content of face-to-face differs from telephone guidance, need to be considered.

In reaching conclusions on the basis of the cost-effectiveness data there is likely to be some debate about what presents a significant difference in costs between the services. The two services spent £10.5 million between them in the quarter under consideration, servicing 125,000 clients nationally. The analysis assumes that an amount of £10 per client does not represent any difference.

When comparing the costs overall:

- The cost of delivering a 'guidance' session through **learndirect** is currently roughly comparable to the costs of nextstep provision.
- The cost of generating an action plan is greater for **learndirect** than nextstep. This indicator is negatively affected by the proportion of **learndirect** service users who do not take up an action plan.
- Learning output costs are higher for **learndirect** than nextstep (ie cost per entry into learning), while employment output costs (ie cost per entry into employment) are lower.
- It is not clear whether any differences in the cost between **learndirect** and nextstep are the result of cost-efficiencies or differences in the nature of the two services. nextstep provision is different to that provided by **learndirect**, and is generally provided to a different client group. Furthermore, as it is larger and more established and receives a greater number of referrals from other organisations, nextstep provision benefits from economies of scale and lower marketing costs.

Taking these points into account we consider that, overall, **learndirect** had delivered cost-effective telephone guidance. Furthermore, over time it is likely that the costs of **learndirect** provision relative to nextstep will fall, but not substantially. The **learndirect** costs presented in this analysis include some element of set-up costs, (eg telephony and systems, staff training and recruitment, and raising brand awareness) and it is, therefore, likely that greater cost-efficiency in the supply of telephone guidance will be evidenced over time. In addition, calculation of the number of advisors required to deliver the service at any one time will become more accurate. At the outset, the software used to make these calculations had only evidence relating to the supply of advice on which to base the calculations. As information about demand and capacity to deliver guidance is generated, this calculation will become more refined. This is likely to improve estimation of the required staff resource, and again

lead to greater cost-efficiency. Similarly, as the **learndirect** guidance service brand becomes more familiar the number of referrals from friends, colleagues, and other organisations is likely to increase which will have a positive impact on **learndirect** costs.

7 Conclusions

7.1 Is there demand for the LLA service?

There has been considerable demand for the LLA service, but less so for action planning and call-backs. **learndirect** guidance received over 46,000 calls between January and July 2006, approximately 14,000 of which involved action planning. Calls were reasonably evenly spread throughout this period with some seasonal variations. Overall there has been a slight upward trend. There is certainly scope for future demand as the total number of calls taken represents only a small minority of the total people in the labour force in the target population.

A significant number of calls seem to have been generated among the target groups of women returners and people wishing to qualify to Level 3. Callers ring for a range of reasons related to both work and learning, and these include needing a change (34 per cent) and finding out about using existing experience elsewhere (14 per cent).

Whether or not a caller is eligible for the action plan and call-back service is not recorded in the **learndirect** management information and, therefore, it is not possible to assess the extent to which eligible callers take up the action plan service and conversely to assess which, if any, groups of eligible callers are less likely to do so. This is an area for further research.

Caller survey data suggests that the three-stage model of support was more likely to have been used by inactive callers than those in work. The model has not been used by the majority of callers, although individuals who report a greater number of calls to the service and recognise developing an action plan are more likely to report positive outcomes.

7.2 Has learndirect got the capacity to meet demand?

learndirect has developed internal capacity through personal development and promotion of existing staff supplemented by external recruitment, and has met demand for the trial successfully thus far. The number of LLAs has expanded throughout the lifetime of the trial, and although demand for the service has increased slightly the number of advisors has increased slightly faster (from 41 FTE in January to 68.6 FTE in September compared to 5,400 to 8,800 guidance calls over the same period). It is likely that over the lifetime of the trial the number of call-backs and on-going work with callers has increased, but it is not possible to examine this from the management information available.

learndirect has largely recruited advisors internally, from LA roles, growing the capacity for Life-long Learning Advisors without calling on previously qualified guidance professionals. This may mean that **learndirect** can expand the number of LLAs further, if required, and that they have a sustainable model of employment centred on internal progression.

Advisors have a programme of continuous professional development which includes access to relevant qualifications, including at a post-graduate level. They have access to a wealth of information to support the guidance process. Although they may not have as extensive local level information as nextstep sub-contractors, LLAs make local level referrals and use local sources of information to inform guidance sessions.

7.3 Is telephone guidance feasible?

learndirect telephone guidance is in many instances as good as the best face-to-face practice and is feasible for the majority of callers. More than half of the **learndirect** guidance calls were graded as 'excellent' or 'good' and telephone guidance can be as good as the best face-to-face work. However, there is no comparison for this assessment and it is, therefore, not possible to assess how this proportion of good and excellent calls compares to other guidance services.

Overall, telephone guidance appears to be feasible for the majority of callers with many reporting hard and soft outcomes. Telephone guidance has some specific benefits, such as accessibility and flexibility, that may increase its appropriateness when compared to face-to-face services for some client groups. In addition, telephone is reported to be the preferred method for obtaining guidance for some. Nevertheless there are groups of callers for whom it appears to be less appropriate. These include callers who lack access to computers and the Internet or the skills to use them effectively, and callers with English as a second language.

It is currently left up to callers to disclose whether they have any basic skills needs or a long-term health problem or disability that may affect their working life. This information may be crucial to make a caller's action plan relevant and workable. LLAs could be trained to sensitively ask callers about these issues and to discuss any implications for work and learning. Within the caller survey 13 per cent of respondents reported that they had a health problem or disability that substantially limited their ability to carry out day-to-day activities. This suggests that between January and July just under 2,000 action planners are likely to have had a health problem or disability.

7.4 How cost-effective is telephone guidance?

learndirect telephone guidance has been cost-effective and may become more so over time as set up costs are spread over a longer time period. The comparison of the cost-effectiveness of **learndirect** compared to face-to-face services depends on the costs that are included in each calculation. On the basis of the available data nextstep advice and **learndirect** guidance are broadly similar in terms of cost per 'guidance' session. However, **learndirect** costs contain some set-up costs, such as systems, telephony, staff training and recruitment, and raising brand awareness.

The greatest difference was in respect of marketing which accounted for over half the spend of **learndirect** between April and June 2006, compared to three per cent of the total nextstep spend during the same period. The majority of nextstep clients are referred to the service from other organisations. This will have some time and cost

implications, but they are not estimated in this assessment. In addition, nextstep sub-contractors hold a variety of contracts and in some instances there may be cross-subsidisation between LSC funding and other contracts.

learnirect guidance and nextstep advice services also work with different user groups which affects the cost-effectiveness indicators based on outcomes. nextstep service users are more likely to be unemployed and qualified below Level 2 (this is not surprising given the restrictions on eligibility for the service) and to report learning rather than work outcomes.

7.5 Are users satisfied with the service?

Overall, users of the **learnirect** guidance service are satisfied with the service, with 86 per cent of respondents agreeing that the overall quality of **learnirect** guidance service was good. However, users were less satisfied with some areas of the service than others. The helpfulness of the advisor was the aspect of the service that callers were most likely to report they were satisfied with (75 per cent). Users were less likely to be satisfied with local level information and sector specific information (44 and 58 per cent respectively).

7.6 What are the short-term outcomes of the service?

Callers report a wide variety of work, learning and soft outcomes. Nineteen per cent of respondents to the caller survey had moved from unemployment or inactivity into work at the time of the survey. Overall 30 per cent of callers reported starting on a course at some point since their first call. Callers who recognised that they agreed an action plan were more likely to report outcomes, as were callers who had a greater number of calls to the service. This suggests an association between the intensity of the interventions and the achievement of positive outcomes.

Soft outcomes were more likely to be attributed to the service than hard outcomes, with approximately half of all callers reporting soft outcomes attributing them to **learnirect**. Callers' soft outcomes included increased confidence in their ability to do some learning, and an increased clarity about what they wanted to do with their career.

Callers reported future planned actions. While some of these may not be carried out in actuality, it may be suggestive of an ongoing influence of the guidance session(s) beyond what could be captured in the timescale of this evaluation.

7.7 Opportunities for development

Overall, the trial has demonstrated that there is a demand for telephone guidance from different clients to those of nextstep. An assessment of a sample of calls suggests that **learnirect** is well-placed to meet demand for telephone guidance and that at its best the service is as good as the best face-to-face practice. However, there are some areas where the service could be strengthened.

- There is some variability in the quality of calls which could be addressed with slight changes to procedure (for example during the handover between IAs and LLAs), and staff development (for example in help for specific user groups). Data collection should include whether or not a client is eligible for an action plan; this

would enable the service to measure the proportion of eligible callers who do not opt for the action plan service.

- Whether a caller is available at the time of call-back seems to be creating inefficiencies. Collecting quantitative information on the scale of this problem would be a useful start. Reminding callers of their appointment time shortly before their session, via for example email or text message, may also increase the number of call-backs that are successful.
- Some callers referred to the service from other organisations were reported not to have a good understanding of **learndirect** guidance. **learndirect** could work with partners to ensure that advisors and relevant staff within referring organisations have a thorough understanding of the **learndirect** guidance service and are able to brief clients appropriately prior to their call.
- The service is largely dependent on web-based material and email. For those callers who did not have access to a computer or the skills to use it there needs to be a range of alternative material that can be posted. Advisors need to probe for callers' ability and confidence to use computers to ensure that suggested actions are appropriate and feasible.
- Older people do not appear to use **learndirect** guidance in proportionate numbers. While this is also true of face-to-face services, nextstep have a larger proportion of clients from this group. Advisors reported some specific reasons why older people might call the service, for example explaining to employers why they want to move to part-time work or to a lower paying position. These reasons for calling could form the basis of advertising to try to increase the number of calls from this group and advisors could be trained to ensure that they can work effectively with clients from this age group.
- Sector specific information is valued by callers. Labour market information can be difficult to apply in a guidance setting and advisors have reported that sector specific workshops have helped in this regard. Further collaboration between the Sector Skills Councils and **learndirect**, building on existing SSC partnerships to offer a range of services such as sector-specific helplines, job profiles and labour market information workshops, could increase LLAs' knowledge of specific sectors. **learndirect** could collect sector information from callers to gain a better understanding of demand for sector-specific information and then use this to better articulate demand to Sector Skills Councils.
- Recognising an action plan has been a key factor in satisfaction and outcomes. Procedures could be developed to ensure that advisors explain the concept of an action plan to callers towards the end of a call to try to increase the recognition and usefulness of action planning overall.
- Caller survey evidence suggests that the three-stage call-back model has not been used by the majority of callers. It is unclear as to why this has been the case, and whether it has not been demanded by callers or whether callers simply miss appointments. Starting by collecting management information to assess the scale of the issue, **learndirect** should investigate the low use of call-backs further as there is evidence to suggest benefits to callers who recognise their action plan and who have used the service more intensively.

7.8 Issues for further examination

The research has highlighted a number of issues which would be useful to investigate further.

NICEC developed a framework to evaluate telephone guidance and it has shown that it is possible for telephone guidance to be as good as the best face-to-face work. To contextualise the scores for **learnirect** guidance and the proportion of 'good' or 'excellent' calls that may be expected in face-to-face work, the same framework needs to be used to assess a sample of face-to-face sessions.

Whether or not callers recalled developing an action plan was related to several outcome and satisfaction variables. All respondents to the caller survey were recorded as developing an action plan with an advisor. In some instances there may be delivery issues, with for example a copy of the action plan not being offered by post for callers without access to computers. In others callers may not see the need for, or recognise that they had actions to undertake as part of the guidance process. Better understanding of the reasons for this and the extent to which callers see an action plan as a useful part of the process would help to inform an appropriate model of telephone guidance provision.

The three-stage call-back model has been implemented using a number of advisors to deal with any one client. While in some cases this might enable the caller to have a fresh perspective on their situation, in others callers reported feeling 'passed' around and noted a lack of continuity. Whether or not advisors are able to have their own caseload is a practical issue for **learnirect**. However, the impact on callers also needs to be considered. To help inform the model of delivery, the satisfaction and outcomes for a sample of callers who worked with one advisor, could be matched and compared to the satisfaction and outcomes of callers who worked with more than one advisor.

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Annexes

Annex A - Call recording sample profile

Call recording sample by caller qualification level (%)

Qualification level	% of population*	Target quota	Number achieved
Level 0	15	15	15
Level 1	24	25	21
Level 2	36	35	38
Level 3 or above	25	25	22
Not recorded			4
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>

* Population figures based on all action planners between January 2006 and April 2006

Source: learndirect management information, NICEC, 2006

Call recording sample by gender of caller (%)

Gender	% of population	Target quota	Number achieved
Female	60	60	58
Male	40	40	42
<i>Total</i>		<i>100</i>	<i>100</i>

Source: learndirect management information, NICEC, 2006

Call recording sample by caller employment status (%)

Employment status	% of population	Target quota	Number achieved
Employed/self-employed (FT and PT)	41	40	42
Unemployed	45	40	37
Inactive (ie non-employed)	13	20	20
Not recorded/other			1
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>

Source: learndirect management information, NICEC, 2006

Call recording status by whether or not the caller was in learning (%)

In learning	% of population	Target quota	Number achieved
NOT in learning	93	85	91
In learning	7	15	9
<i>Total</i>		<i>100</i>	<i>100</i>

Source: *learndirect* management information, NICEC, 2006

Profile of the sample of calls by age

Age	Actual (%)
Under 19	2
20-24	17
25-49	44
50+	4
Total known	67
Unknown	33
<i>Total</i>	<i>100</i>

Source: NICEC, 2006 NB: Data on age was not available to use in the quotas

Annex B - Caller survey sample profile

Caller survey sample by caller qualification level January-April

Qualification level	% of population*	Proportion of 1,000 interviews	Number of interviews achieved
Level 0	15	153	168
Level 1	24	236	216
Level 2	36	357	358
Level 3 or above	25	253	258
<i>Total</i>	<i>100</i>	<i>1,000</i>	<i>1,000</i>

* Population based on all action planners between January 2006 and April 2006

Source: learndirect management information, caller survey, IES 2006

Caller survey sample by gender of caller January-April

Gender	% of population	Proportion of 1,000 interviews	Number of interviews achieved
Female	60	596	588
Male	40	404	412
<i>Total</i>	<i>100</i>	<i>1,000</i>	<i>1,000</i>

Source: learndirect management information, caller survey, IES 2006

Caller survey sample by caller employment status January-April

Employment status	% of population	Proportion of 1,000 interviews	Number of interviews achieved
Employed/ self-employed (FT and PT)	41	414	402
Unemployed	45	452	460
Inactive (ie non-employed)	13	134	138
<i>Total</i>	<i>100</i>	<i>1,000</i>	<i>1,000</i>

Source: learndirect management information, caller survey, IES 2006

Caller survey sample by whether or not the caller was in learning January-April

In learning	% of population	Proportion of 1,000 interviews	Number of interviews achieved
Not in learning	93	933	923
In learning	7	67	77
<i>Total</i>	<i>100</i>	<i>1,000</i>	<i>1,000</i>

Source: learndirect management information, caller survey, IES 2006

Annex C - Quality assessment

Grades of the ten assessable call-backs, related to grades of initial calls

	Followed by A	B	C	D	E
Initial A	–	3	–	–	–
B	–	–	1	–	–
C	1	1	2	1	–
D	–	–	1	–	–
E	–	–	–	–	–
<i>Total</i>	<i>1</i>	<i>4</i>	<i>4</i>	<i>1</i>	<i>–</i>

Source: NICEC, 2006

Distribution of scores and grades for individual interviews

Interview scores/grades	A	B	C	D	E
1,1,1	18				
1,1,2	1	1			
1,2,2		1			
2,1,1	2	1			
2,1,2	1				
2,2,1	1	3			
2,2,2		14	1		
2,3,2		2	4		
3,2,2		6			
3,3,2		1			
2,3,3			3		
2,3,4			1		
3,3,2			15		
3,3,3			8		
3,4,3			5		
3,4,4			1		
4,3,4				1	
4,4,3			1	2	
4,4,4				2	
4,5,4					1
5,4,3					1
5,5,4				1	
5,5,5					1
<i>Totals</i>	<i>23</i>	<i>29</i>	<i>39</i>	<i>6</i>	<i>3</i>

Source: NICEC, 2006. NB scores only listed if an instance was recorded (eg there were no 1, 2, 3 scores). Highlighted boxes indicate where scores and grades were entirely consistent.

Annex D - Respondent profiles for learndirect and nextstep client surveys

learndirect ongoing customer satisfaction survey respondent profile (%)

	Core service respondents (weighted)	Guidance respondents (weighted)
Gender		
Male	39	42
Female	61	58
Age		
< 24	27	27
25-45	53	60
45+	21	14
Employment status		
Self-employed	4	5
Employed	46	44
Unemployed	18	11
Non-employed	32	40
Qualification level		
Pre-Level 2	38	50
Level 2+	62	50
Level 3+	37	18

Source: *BMG Research Report 2006, Ufi Ltd Helpline Customer Feedback, July 2005 - June 2006, Annual Report*

Comparison of clients included in the nextstep impact survey compared with nextstep management information

	Advice service		Enhanced service		MTL Impact Survey	
	N	%	N	%	N	%
Gender						
Female	106,983	46.7	7053	41	1,052	58
Male	122,203	53.3	10,135	59	771	42
Work status						
Employed/self-employed	59,255	25.9	4,310	25.1	–	37
Unemployed/non-employed/other	169,931	74.2	12,878	74.9	–	63
Highest qualification						
Other	1,675	0.7	104	0.6	–	3*
Below Level 2	209,308	91.6	16,088	93.8	–	64
Level 2	7,912	3.5	566	3.3	–	19
Level 3	4,593	2	195	1.1	–	7
Level 4 and above	4,939	2.2	235	1.4	–	5

– data not available

* only overseas qualifications are included here, the survey did not use a category for 'other' qualification

Source: nextstep MI; MTL Impact Report

OVERALL GRADE THIS INTERVIEW_____

CALLER IDENTIFIER_____

INTERVIEW NUMBER_____

Annex E - NICEC learndirect Guidance Assessment Framework

April-August 2006

General notes on interview

	GRADING/SCORING SYSTEM: OVERALL
A	Interview and apparent outcomes excellent
B	Interview and apparent outcomes good
C	Interview and apparent outcomes acceptable
D	Interview significantly flawed, affecting apparent outcomes
E	Poor interview, caller possibly disadvantaged as result
	Section I, Process
1	Procedures conducted to standard of best professional practice
2	Procedures followed correctly
3	Procedures mainly followed, some acceptable errors
4	Procedures mainly followed, but offset by significant errors
5	Procedures not followed in significant ways

	Section II, Skills
--	--------------------

1	Skills used to best professional effect
2	Skills used well
3	Skills mainly used, some acceptable errors
4	Some important skills not used when needed
5	Significant failure to use skills
	Section III Apparent Outcomes, This Interview
1	Significant increase in caller's apparent distance travelled; good action plan; caller appropriately well satisfied
2	Some increase in caller's apparent distance travelled; reasonable action plan; caller satisfied
3	Possible increase in caller's apparent distance travelled; action plan; caller satisfied, perhaps inappropriately
4	No apparent increase in caller's apparent distance travelled; poor action plan; caller unsatisfied, or if satisfied then inappropriately
5	Caller apparently left more confused after call, even if not aware of this; action plan inappropriate; caller unsatisfied or if satisfied then inappropriately
	Section IV Apparent Outcomes, All Interviews So Far
1	Significant increase in apparent overall distance travelled (possibly some appropriate action taken); caller appropriately well satisfied
2	Some increase in apparent overall distance travelled; caller satisfied
3	Possible increase in apparent distance travelled; caller satisfied, perhaps inappropriately
4	No apparent increase in distance travelled; caller unsatisfied, or inappropriately so
5	Caller apparently left more confused after series of calls; caller unsatisfied or if satisfied then inappropriately

CALLER IDENTIFIER_____

INTERVIEW NUMBER_____

I. PROCESS

A EXPLORATION

			<i>Notes on advisor's intervention and caller's response</i>
1. WELCOME	<ul style="list-style-type: none"> i ii iii iv v 	<p>Caller welcomed, advisor introduces self</p> <p>Establishes this is a convenient time to speak (if call initiated by advisor)</p> <p>If not first interview, clarification of previous discussion(s)</p> <p>Caller invited to disclose any circumstances of relevance to the interview or its outcomes eg ability to make notes (practical situation and literacy skills) need for the use of specialist technology or facilities whether confident to use IT for communicating, self-awareness exercises, learning</p> <p>Atmosphere established in which caller is able to express any concerns and explore their issues</p>	
2. CONTRACT	<ul style="list-style-type: none"> i ii iii iv 	<p>Purpose of this interview and possible outcomes explained</p> <p>Policies explained on: confidentiality record-keeping impartiality</p> <p>The role of any third parties agreed, where relevant</p> <p>Time available for this call negotiated, and options for future calls explained</p>	
			<i>Notes on advisor's intervention and caller's response</i>

OVERALL GRADE THIS INTERVIEW_____		INTERVIEW NUMBER_____
3. AGENDA	<ul style="list-style-type: none"> i If not first interview, actions taken since last interview reviewed and outcomes clarified ii Caller encouraged to identify, explore (and review if not first interview) their requirements and ideas for achieving them iii Requirements that cannot be met through this service identified and agreed, and referred appropriately (throughout interview) iv Agenda for interview(s) negotiated, taking into account caller's requirements, ideas, priorities; action plan explained. 	

4. EXPLORATION OF CALLER'S SITUATION	<ul style="list-style-type: none"> i Caller enabled to provide information on their situation, requirements and preferences ii Issues raised by caller explored to clarify their nature and scope iii Provisional, proportionate response given to caller's immediate requirements at each stage (but not treated as main request until full picture clearer) iv Where immediate action is required, callers are recommended to take such action v Additional assessment or diagnostic activities (including the use of Futures or other technology) agreed and arranged if appropriate vi If such activities already used, learning clarified vii Caller's issues summarised, to clarify and identify priorities 	
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B GOAL-SETTING

		<i>Notes on advisor's intervention and caller's response</i>
1. NEW PERSPECTIVES/ OPTIONS	<ul style="list-style-type: none"> i Caller encouraged to review information disclosed so far, and identify key issues ii Caller encouraged to develop new perspectives iii Any unrealistic assumptions and requirements identified and challenged iv Unrealistic goals explored, key features identified, possible alternatives considered v Suitable range of options (goals) identified, and understanding checked 	

CALLER IDENTIFIER_____

INTERVIEW NUMBER_____

2. INFORMATION-GIVING	<ul style="list-style-type: none"> i ii iii iv 	<p>Caller's preference for how information is recorded and shared with him/her checked (eg by email, sent through post).</p> <p>Clear and accurate information on options (key features) provided in format and manner appropriate to the caller (see Section II, Skills Checklist)</p> <p>Caller assisted to interpret the information provided</p> <p>Caller assisted to record key details of information provided</p>	
3. DECISION-MAKING	<ul style="list-style-type: none"> i ii iii iv 	<p>Potential consequences of options explored, relating to:</p> <ul style="list-style-type: none"> career goals personal/family life practicalities (eg travel, childcare) cost <p>Possible obstacles to options identified, and ways of overcoming them, in relation to each option, considered where feasible</p> <p>Caller encouraged to consider all relevant information and evaluate implications</p> <p>Caller assisted to reach a decision on the most appropriate option for their requirements</p>	

I. C ACTION-PLANNING (see also III.3 below) AND ENDING INTERVIEW

			<i>Notes on advisor's intervention and caller's response</i>
1. AGREEING COURSES OF ACTION	<ul style="list-style-type: none"> i ii iii iv 	<p>The agreed course of action confirmed, including clarifying:</p> <ul style="list-style-type: none"> the most effective method for implementing it key objectives stages <p>Any requirements that cannot be met reviewed, and alternative sources of help clarified</p> <p>Caller's recording of the main points of the action plan checked</p> <p>Caller informed of the written records the advisor has made</p>	

CALLER IDENTIFIER_____

OVERALL GRADE THIS INTERVIEW_____

INTERVIEW NUMBER_____

	v	Caller informed of what materials s/he will be sent following the interview	
2. ENDING INTERVIEW	i ii iii iv	Interaction, including decision-making process, and outcomes achieved clearly summarised Opportunities for further support clarified, including future interview options Caller's understanding of how to make future contact, and ability to do so, checked Interview closed in friendly manner	

CALLER IDENTIFIER_____

INTERVIEW NUMBER_____

A. USED IN ALL GUIDANCE	<i>Note any used in-appropriately, or not used when needed</i>	B. USED PARTICULARLY IN DISTANCE GUIDANCE	<i>Note any used in-appropriately, or not used when needed</i>
<p>i. Appropriate use of:</p> <ul style="list-style-type: none"> Active listening Empathising Reflecting Clarifying Paraphrasing Summarising Challenging Showing interest in the caller’s situation Being supportive and encouraging Closed and open questioning Inviting responses Focusing responses Being concrete <p>ii. Free from any stereotyping or personal bias</p> <p>iii. Maximising of equality of opportunity</p> <p>iv. Safety issues of outcomes considered</p> <p>v. Clarity of information:</p> <ul style="list-style-type: none"> Explaining acronyms and other jargon Slow spelling out of proper names <p>vi. Giving callers space and time to speak (with no inappropriate interrupting)</p> <p>vii. Enabling caller to express reactions and feelings</p>		<p>i. Advisor’s tone, pitch, loudness of voice, speed of talking, inflection, emphasis, accent, tone, silences, pauses, use of encouragement, hesitation, all appropriate to caller and content; speed and intonation matched to caller’s</p> <p>ii. Caller’s use of above interpreted correctly (including any signs of distress)</p> <p>iii. Silences handled sympathetically</p> <p>iv. Caller is kept informed about any distracting noises made by advisor (eg entering data in computer) or silences (eg when searching for information)</p> <p>v. Any use of the ‘hold’ facility is appropriate and explained to the caller</p> <p>vi. Call transfers are fully explained and used appropriately</p> <p>vii. Difficult calls dealt with appropriately (eg use of assertiveness techniques, disarming anger and ‘broken record’)</p> <p>viii. Pacing: Stages of the guidance process are distributed appropriately between telephone calls Caller feels able to signal their desire to end the call Advisor manages any tension between the time and resources available and caller’s requirements</p> <p>ix. Issues to do with caller’s location: Appropriateness of opportunities checked Any referral to local agencies is appropriate</p>	

CALLER IDENTIFIER_____

GRADE SECTION III_____

INTERVIEW NUMBER_____

III. APPARENT OUTCOMES FOR CALLER , THIS INTERVIEW

1. APPARENT CALLER SATISFACTION	i	Caller seems satisfied with interview	
2. APPARENT DISTANCE TRAVELLED. Increase in caller's:	i ii iii iv v vi vii viii ix x xi	Confidence/self-esteem Awareness of existing skills Motivation/ambition Focus/decidedness Information/understanding Realism Scope/breadth of vision Tactics (towards ultimate goal) Awareness of rights, including safety at work Awareness of sources of support Career planning skills	(iv. NB abandoning inappropriate plans, ie loss of decidedness, can be desirable and represent distance travelled)
3. APPARENT APPROPRIATENESS OF ACTION PLAN	i ii iii iv v vi vii viii ix	Goals fully explored, and appropriate to this caller AP is Specific AP is Measurable AP is Achievable, and responsibilities clearly allocated AP is Realistic AP is Time bound Arrangements for review are in place Any changes to pre-existing action plans are justifiable Appropriate targets are set for immediate next steps	

CALLER IDENTIFIER_____

INTERVIEW NUMBER_____

			<i>Notes</i>
1. APPARENT CALLER SATISFACTION	i	Caller seems satisfied with interviews	
2. APPARENT DISTANCE TRAVELLED SINCE FIRST CALL. Increase in caller's:	i	Confidence/self-esteem	
	ii	Awareness of existing skills	
	iii	Motivation/ambition	
	iv	Information/understanding	
	v	Focus/decidedness	
	vi	Realism	
	vii	Scope/breadth of vision	
	viii	Tactics (towards ultimate goal)	
	ix	Awareness of rights	
	x	Awareness of sources of support	
	xi	Career planning skills	
3. REPORTED BEHAVIOUR CHANGE FOLLOWING GUIDANCE CALLS	i	Relating to learning	
	ii	Relating to employment	
	iii	Other	

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