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Evaluation of the Deepened Co-
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RESEARCH

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Executive summary

This report has been written by CFE for the Department for Business, Innovation and Skills (BIS) and the Department for Work and Pensions (DWP). It is based on case study visits to eight of the 22 Jobcentres that took part in the Deepening Co-location Trials with Next Step. It highlights key issues arising from the research with a view to contributing to the success of the wider roll-out of co-location in Jobcentres in England.

Key Findings

A minimum set of standards for the Deepening Co-location Trials were developed. These have broadly been met and have contributed to the development of deepened working relationships in the Trial sites visited. However, the approaches adopted vary considerably due to custom and practice, local needs and priorities, perceptions of how best to build on previous joint-working arrangements, office space and layout, and workflows.

A range of innovative approaches to the implementation of the Trials and service delivery were developed:

- The installation of interview 'pods' undoubtedly brought added value, both in terms of increased awareness of the National Careers Service and an enhanced customer experience. However, pods are costly to install and it is far from certain that a widespread roll out would be feasible and the best use of available resources.
- Information Advisers fulfilled a crucial role in relation to a number of aspects of co-location. The role is particularly effective and adds most value when the post-holder has a background in guidance and is fully engaged with customers as well as Jobcentre and National Careers Service staff. If the appointment of Information Advisers is taken forward, clarification regarding their role and remit is, however, required to ensure the role complements the work of Careers Advisers operating within the funding model.
- A range of innovative approaches to planning and service delivery were observed and include: strategic planning between Prime Contractors and the Jobcentre Plus Leads to develop joined up approaches to meeting customer needs, including key priority groups; mechanisms to ensure Jobcentre staff are regularly updated about the National Careers Service offer; and processes to enhance the 'customer journey' through improved needs assessment, direct access to web and telephone services in the Jobcentre, individual and group interventions, and regular follow-up.

There was an underlying tension between the desire to be 'innovative' in the design and implementation of the Trials and the drive to be operational as soon as possible. This proved particularly challenging where plans involved changes in infrastructure. The work involved in planning, risk assessing and implementing changes was often under-estimated and this led to substantial delays in some instances. Delays could have been reduced if the estates and facilities manager had been engaged in the planning process earlier and materials had been approved initially under Jobcentre Plus Environment Guide (JPEG)

guidance. However, the tenacity and determination of partners to develop creative solutions to the challenges and make co-location a reality was striking.

With a few notable exceptions, there is a lack of awareness and understanding amongst many Jobcentre Advisers of the telephone and web channels and a lack of consistency in 'signposting' and 'referral' arrangements. As a result, it is far from clear whether customers are always accessing the most appropriate services in the most appropriate way. In addition, although some systems and processes have improved as a result of co-location, the duplication of effort that results from the lack of a common IT system and other key processes remains a principal barrier to effective and efficient joint working.

The Trials had a positive impact on advisers' awareness of the respective organisational roles and remits. In areas where practice was well-developed, advisers' understanding of the targets and constraints within which their counterparts operate, as well as their appreciation of the ways in which their respective roles and skills can complement and aid one another as well as customers, also improved as a result of the Trials.

Conclusions

Co-location in Jobcentres enables Next Step to provide access to services for key priority groups. Sharing facilities is not only cost-effective in the longer term but also has the potential to enhance the offer for Jobcentre customers, who largely welcome the opportunity to access services in this way and find the advice and guidance helpful. As co-location rolls out, there is considerable scope to build on the good practice developed prior to, as well as during, the Trials and to optimise partnership arrangements through the development of more consistent and effective approaches.

One of the key aims of the National Careers Service is to deliver a 'universal' service alongside a service to priority groups through its three channels. Some 70 per cent of referrals to the face-to-face channel are currently coming through Jobcentre Plus and this is likely to increase as co-location is extended. Policy decisions need to be taken to determine what level of face-to-face service will be available to non-claimant groups and those voluntarily accessing services within and/or outside of Jobcentres. In the context of available resources, consideration should also be given to how professional, impartial advice through the National Careers Service is to be made available in a wide range of locations to extend the known benefits to the widest range of customers.

Recommendations

In light of these findings, CFE would like to make the following recommendations:

Department for Business Innovation and Skills

- Jointly consider the research findings with DWP and other national partners and disseminate the findings to help inform developing practice.

- In consultation with bodies including the National Careers Council¹, consider the future strategic direction of the National Careers Service, including the balance of work that is to be undertaken in and through co-location in Jobcentres.
- Agree in discussion with Department for Work and Pensions and other parties how co-location can best be developed, including what resources, new systems and new arrangements might be necessary to work towards the enhanced working practices evidenced through the Trials.
- Consider the case for providing additional resources to enable an agreed number of Information Advisers in Prime Contractor areas to be appointed and to task them with putting forward proposals to demonstrate where they could add the most value. If funding is secured, ensure that appropriate performance measures are put in place along with an evaluation framework capable of monitoring and assessing the extent to which outputs, outcomes and key success criteria are being met.

Skills Funding Agency

- Disseminate the report, or an agreed summary, to Prime Contractors and seek their views on the findings. In light of policy priorities and the available resources, agree a way forward in respect to the roll-out of co-location arrangements.
- Review the current guidance that is available to Prime and Sub-Contractors in respect to the delivery of co-located services and ensure that this aligns with and complements that issued by DWP to Jobcentre staff.
- Within available resources, develop with DWP ways of providing training to help Jobcentre staff better understand the extent and nature of the National Careers Service provision (e.g. both tools and interventions) and the benefits to them and their customers of using these services.
- Deploy Information Advisers in agreed locations if further appointments are possible beyond March 2013.

Department for Work and Pensions

- Disseminate the report, or an agreed summary, to relevant staff within Jobcentre Plus to help inform developing policy and practice.
- Encourage District Managers and local Performance and Change Managers to consider the arrangements for 'referring' and 'signposting' claimants, and wider customer groups, to the National Careers Service, in order to help promote the use of telephone and web-based services and ensure the most appropriate use of co-located face-to-face services. This could involve the introduction of local National Careers Service champions in Jobcentre Districts who are regularly briefed about all aspects of National Careers Service developments and outcomes and who could

¹ See: <http://www.bis.gov.uk/policies/further-education-skills/national-careers-council>

assist in disseminating this information to relevant colleagues, including new staff through induction.

- Work with BIS and the Skills Funding Agency to raise the awareness and understanding of Jobcentre Advisers about the National Careers Service, including supporting both local and wider training events (e.g. in connection with the Service's telephone and web-channel providers) and disseminating agreed training resources (e.g. podcasts) through the Knowledge Hub and other appropriate mechanisms.

1 Introduction

Between September 2011 and March 2012, 22 Jobcentres took part in trials to pilot deepening co-location arrangements with Next Step, which from 1 April 2012 became the National Careers Service. This report examines the effectiveness of these arrangements and the impact they have had on the customer journey.

Introduction

This research report has been written by CFE for the Department for Business, Innovation and Skills (BIS) and the Department for Work and Pensions (DWP). It provides the research findings and good practice identified during case study visits to eight of the 22 Jobcentres that took part in the Deepening Co-location Trials with Next Step. It highlights key issues arising from the research with a view to contributing to the success of the wider roll-out of co-location in Jobcentres in England.

Policy background

The Deepening Co-location Trials took place within a dynamic policy environment. DWP has a challenging agenda of reform which aims to: create a new welfare system for the 21st century; transform the opportunity for people without jobs to find work and support themselves and their families; and ensure that the most vulnerable people in society are protected (DWP, 2011). Jobcentre Plus has a key role in achieving these departmental objectives. It works closely with private, public and voluntary sector partners, supports the delivery of the Work Programme and is committed to working ever more closely with employers and partners to improve services. However, recently, Jobcentre Plus has been subject to considerable organisational change, including restructuring from 48 to 37 districts. An increasing emphasis is also being placed on local decision-making in relation to the way in which operational objectives can best be achieved.

Information, advice and guidance policy in England has also been subject to radical reform in recent years. Previously, services were differentiated by age: Connexions was the organisation responsible for the delivery of services to young people, whereas information, advice and guidance for adults aged 19 and over was managed and delivered by Next Step through a network of regional Prime and Sub-Contractors. Adult services were accessible through a range of channels including the telephone and the web. Face-to-face services were delivered in a number of locations including Next Step offices, community venues, libraries and Jobcentres.

The Coalition Government has enacted a raft of policies and funding decisions which have reframed the way in which careers work is delivered to young people and adults in England. Key reforms include the abolition of Connexions in most areas, with responsibility for careers education, information, advice and guidance for young people shifting to schools and the transformation of Next Step into an 'all-age' service.

The National Careers Service was launched in April 2012 and has a brief to provide 'authoritative information on learning and work' and 'professional impartial advice' (BIS, 2012). The Government indicated at the time of its launch that the Service was to be made

available in a 'wide range of locations' to enable Careers Advisers to provide 'professional advice to help those seeking work'.

The Deepening Co-location Trials

Prior to the Deepening Co-location Trials, the Next Step face-to-face channel was located in approximately 85 per cent of Jobcentres. However, service delivery was often only available on a part-time basis. The Skills Funding Agency in consultation with Next Step contractors identified that there was scope to increase the level of service to Jobcentre Plus customers if a range of issues were addressed.

The Deepening Co-location Trials were launched quickly at Ministers' request in summer 2011. The Skills Funding Agency issued guidance to Prime Contractors in mid-August 2011, and costed proposals were required by the end of the same month. The guidance indicated that the Trial locations should operate within a set of minimum requirements. Nominated locations were, therefore, invited to provide 'innovative suggestions' in Joint Implementation Plans which would provide them, 'with the capability to enhance co-location arrangements within the nationally-defined minimum model and to provide customers with a deepened employment and skills advice offer' (Skills Funding Agency, 2011:3).

The Trials ran from September 2011 until March 2012 in 22 locations. Sites were selected in order to provide full geographic coverage. Two Trial sites were established within each Next Step Prime Contractor area. The specific locations were identified using data provided by Jobcentre Plus and the Prime Contractors. In all cases, the Trials were designed to build on existing working arrangements. Although the Trials are now complete, funded work has continued in some Trial areas. In particular, Information Advisers (or equivalents) appointed during the Trials have continued to operate in some sites.

The primary objectives of the Trials were: a streamlined customer journey and improved customer experience; savings from more efficient use of delivery locations by inward location of Next Step in Jobcentres; enhanced Next Step attendance rates; and improved outputs and outcomes.

The Deepening Co-location Trials provided an opportunity to increase access for Jobcentre Plus customers to direct support from Next Step provision in their journey back to work, in particular, helping customers to recognise and address skills issues that act as a barrier to employment.

DWP issued guidance for Jobcentre Advisers outlining the process through which Jobcentre Plus customers were to be directed to Next Step provision:

- All claimants should be signposted to Next Step including the telephone service (0800 100 900) and web-based offer at each intervention, unless they require a referral to the face-to-face service, or the claimant has previously been referred or signposted and received all the help they require.

- Skills Conditionality applies to all Jobcentre Plus customers who are referred to the Next Step face-to-face channel. Customers are to be mandated to attend both the first and all subsequent Next Step appointments.

Background to the evaluation

In May 2012, CFE was commissioned to undertake a two-part evaluation of National Careers Service Partnership Delivery. The deepened co-location arrangements within Jobcentres were examined during Stage 1 of the evaluation; the Community Walk-in Pathfinders, along with a range of other established partnership models, will be explored in Stage 2. This interim report summarises the findings from Stage 1. Stage 2 will commence in October 2012 and will report in April 2013.

A cross-departmental Project Board was established to support the implementation of the Deepening Co-location Trials and to monitor their operation. Direct monitoring and evaluation activities included: conducting 'Go-look-see' visits to six geographically-dispersed Trial sites; an early internal evaluation study undertaken by DWP based on fieldwork in a further six locations; and surveys to identify best practice and lessons learned within all Trial areas undertaken by DWP and the Skills Funding Agency during the period November 2011 to January 2012.

This summative evaluation of the deepened co-location arrangements was designed to complement the internal monitoring and formative evaluation that took place during the Trials. It was conducted by CFE after the Trials had formally finished and following the transition from Next Step to the National Careers Service. The term 'Next Step' is used to describe activities during the Trials; 'National Careers Service' is used to describe activities since the Trials finished. The 'Service' is used throughout the report as a generic term that encompasses Next Step and National Careers Service.

Aims and objectives

The independent summative evaluation was qualitative in nature and designed to focus in-depth on the work undertaken in eight of the Trial sites. The aim of the evaluation was to assess the effectiveness of the co-location arrangements, including the relative strengths and limitations of the different approaches being implemented and the potential added value of delivering the National Careers Service in Jobcentres in the future.

In order to achieve these aims, the following objectives were set:

- To consider the extent to which the minimum requirements set by the Skills Funding Agency have been met and how this was achieved;
- To capture the perceptions and experiences of Jobcentre Plus and Next Step (latterly National Careers Service) staff involved in the Trials as well as customer views on co-location;
- To examine the impact of co-location on the customer journey and experience; and

- To report on the good practice and lessons to inform the wider roll-out.

Methodology

Stage 1 of the evaluation was completed in four inter-related phases:

Phase 1. Scoping – May 2012

Following an inception meeting between CFE, the Department for Business, Innovation and Skills and the Skills Funding Agency to agree the scope, aims and objectives of the research, CFE embarked on desk research to examine the existing literature on co-location. The Joint Implementation Plans for each of the eight co-location Trial sites to be visited during the primary fieldwork were also reviewed. Scoping interviews were conducted by telephone with nominated stakeholders (see Appendix One), alongside interviews with representatives from the organisations responsible for both telephone channels. Finally, a sample of eight out of the 22 Trial sites was selected for the primary research phase. The six sites that had been examined as part of the DWP review were chosen along with two further sites selected to increase the geographic spread and range of delivery systems covered. The Prime Contractors responsible for the delivery of the face-to-face channel in the selected areas were also interviewed by telephone and their co-operation with subsequent stages of the evaluation secured during this phase.

Phase 2. Research design – June 2012

Drawing on the findings from the desk research and scoping interviews a series of research instruments were developed in conjunction with members of the evaluation steering group. These included a suite of interview topic guides for staff and customers along with a checklist designed to capture contextual information about the Jobcentre environment, employment rates in the local area served, and existing working arrangements with Next Step. Once the research instruments were agreed, a programme of eight one-day field visits to each of the Trial sites was arranged with the co-operation of the relevant Prime Contractor and Jobcentre Plus Leads.

Phase 3. Fieldwork – June/July 2012

Two members of the CFE research team attended the one-day field visits to each of the eight Trial sites. During the field visit, the staff responsible for leading the implementation of the Trial on behalf of Jobcentre Plus and the Service were interviewed along with frontline staff from both services nominated by the respective Leads. Where Information Advisers were still in post, they were also interviewed along with a cross-section of customers who had accessed the National Careers Service² located in the Jobcentre on the day of the field visit, or a short time before. The majority of interviews were conducted face-to-face; however, where staff and/or customers were not available during the field visit the interviews were conducted by telephone. A total of 39 staff and 40 customers were consulted.

² All the customers consulted had accessed the Service following the re-branding of Next Step and the launch of the National Careers Service. None of the customers, therefore, were able to comment specifically on Next Step.

The Jobcentre Plus Leads (i.e., the managers responsible for liaising with the Service) were invited to complete the specially devised checklist (see Appendix Two) and return it by email to CFE. In most cases the checklist was completed in advance of the field visit, but where this was not possible it was completed by CFE in conjunction with the Jobcentre Plus Lead on the day. It was then used as a basis for discussion during the interviews with relevant Jobcentre and Service staff. The information captured on the checklist, coupled with the data contained in the Joint Implementation Plans, helped to establish a baseline of activities prior to deepened co-location and supported the subsequent assessment of the value added by the Trials.

Phase 4. Analysis and reporting – July/August 2012

The qualitative information was collated and analysed thematically, alongside the available management information (MI) produced by the Trial areas. An initial summary of the emerging findings was produced and discussed with the Steering Group at the end of July 2012. Drawing on the feedback from the Steering Group, a full summative research report was produced and circulated for further comment before it was finalised.

This Report

After this introduction the rest of the report is structured as follows: **Section 2** considers the extent to which the Trial sites have met the minimum requirements for co-location, the approaches adopted and the range of issues and challenges that had to be overcome. **Section 3** examines the approaches to co-location, including the systems and processes that have been developed to facilitate its successful implementation. A detailed examination of the role and impact of the Information Adviser in the context of co-location is also contained within this section. **Section 4** explores the impact of co-location on the customer journey and considers the extent to which it has enhanced the customer experience and improved outputs and outcomes. **Section 5** summarises the key findings and presents a series of conclusions and recommendations designed to inform the wider roll-out of co-location in Jobcentres.

2 Meeting the minimum requirements

This section presents how the Trial sites met the minimum requirements for co-location and highlights emerging good practice.

Introduction

Prior to the Deepening Co-location Trials, the Next Step face-to-face channel was located in 491 Jobcentres (85%). Data from Prime Contractors indicated that Next Step Advisers were typically based in Jobcentres for two to three days per week; just 65 benefited from a full-time Next Step presence (Skills Funding Agency, 2011).

It is understood that, with some regional variation, around 70 per cent of referrals nationally to the Next Step face-to-face channel came through Jobcentres. A similar proportion of referrals to the National Careers Service currently come through this route. Consultations conducted by the Skills Funding Agency with Next Step Prime Contractors prior to the Trials indicated that over half felt that there was considerable scope to increase the level of service to Jobcentre Plus customers.

In order to facilitate increased access, level of services and an improved customer experience, a set of minimum requirements for the Deepening Co-location Trials were developed by the Skills Funding Agency with Jobcentre Plus. These were agreed by the joint project board and confirmed with Ministers from both BIS and DWP. The aim was to provide a clear framework for the operation of the Trials which addressed some of the barriers to effective joint-working identified in previous research.

Existing research evidence on co-location

Evaluations of previous initiatives involving joint-working between Jobcentre Plus and Next Step highlighted a range of operational issues that need be overcome if joint working is to be fully effective. The report on the Integrated Employment and Skills (IES) Trials which were underpinned by the co-location of Jobcentre Plus and *nextstep* advice services in Jobcentres in 12 districts from September 2008 concluded that, although useful progress was made, key barriers to a more aligned system were:

- A lack of a shared understanding of the purpose of the new system and the roles of the various players, particularly amongst front-line staff.
- A lack of shared systems and processes.
- Inadequate shared learning and a lack of mutual understanding.
- The lack of a seamless journey through the system and a co-ordinated process for following-up action plans in particular. (Levesley *et al.*, 2009)

More recent independent research undertaken for Careers England sought members' experiences of Next Step co-location with other agencies. In respect to Jobcentres it noted that:

- 'shared targets and key performance indicators are required as part of a strategy to deliver coherent services';
- 'Jobcentre Plus staff need to be aware of all elements and channels of the careers service';
- 'in order for the host and provider to share an understanding of the careers service offer...training, observation and/or joint staff meetings are required';
- 'Jobcentre Plus staff confidence in NCS (sic) staff can be enhanced through delivering sessions to target groups, such as women returners, those transferring from Employment Support Allowance to Jobseekers Allowance, occupational groups and CV workshops'; and
- 'there should be a shared CRM system so Jobcentre Plus and Next Step can share customer information, build and provide a robust provision of support that is geared to early job-entry based on good LMI' (Careers England, 2012).

The research also highlighted what respondents perceived to be the 'mixed success' of mandating designated Jobcentre Plus customers to attend Next Step interviews under the policy of Skills Conditionality, which was a central feature of the customer referral process during the Trials. The policy was subject to a national consultation in 2011 and the Government's response highlighted that:

'The key to success lies in effective working relationships at a local level as well as a clear understanding on all sides of the role and responsibility of the claimant, the Next Step Careers Adviser, the Jobcentre Plus Adviser and the college or training provider'. (BIS/DWP, 2011:6)

The requirements

The Skills Funding Agency's five minimum requirements were:

1. To provide a discretely branded Next Step area within a Jobcentre.
2. To provide full-time access to Next Step services via all channels within the Jobcentre.
3. To provide Next Step with access to broadband and IT systems.
4. To provide Next Step with access to private interview facilities.
5. To develop closer working between Jobcentre and Next Step Advisers.

The Next Step and Jobcentre Plus Leads outlined how they intended to meet the requirements in their Trial's Joint Implementation Plan. Our analysis of these plans along with the checklist data confirmed that long-standing co-location arrangements with Next Step were already established in most sites and some of the elements of the minimum requirements were already in development. However, prior to the Trials, the Next Step presence was part-time in most cases and the nature of the arrangements in place was relatively ad hoc.

In all of the sites visited the five minimum requirements have broadly been met and have contributed to deepened working relationships. However, the approaches adopted in the different Trial sites varied considerably. In the sections that follow we examine these approaches and consider wider issues regarding their effectiveness. The section concludes with an analytical summary of the key findings.

1 Discretely branded area

The Skills Funding Agency guidance indicated that the Trials should develop a discretely branded Next Step area within the Jobcentre which complied with relevant brand guidelines. It suggested that they should achieve the look and feel of a concession within a department store such as 'Costa Coffee within Waterstones'. The aim was to differentiate the Jobcentre offer from the Next Step offer as well as to ensure 'Next Step' as a brand became embedded and more widely recognised overtime.

The Next Step brand

'Next Step' was used to badge information, advice and guidance services for adults until the National Careers Service was launched in April 2012. Given the relatively short time the branding was in place in Jobcentres prior to the launch, it is hard to argue that it achieved the status of a successful brand capable of increasing trust and reducing uncertainty in the eyes of service users (Strauss & Neal, 2008). Furthermore, the staff consulted as part of this evaluation perceived that the decision to replace the Next Step brand and services, and introduce the National Careers Service, was widely welcomed and helped to increase the prominence and awareness of the Service. As one Careers Adviser put it:

'The change of logo and name has helped awareness....I used to take twenty minutes to explain to somebody new what Next Step was. I just think now, National Careers Service, says it all.'

It is interesting to note in this context that at least one of the Prime Contractors involved in the Trials elected to mirror Trial activities in a second Jobcentre, where the parallel 'Trial' did not benefit from the additional branding and other promotional materials. The Prime Contractor perceived that the parallel 'Trial' had been just as successful as the formal Trial. They indicated that although branding and promotional resources are 'beneficial', the key to success is establishing effective working relationships and buy-in to the process at all levels:

'We used another Jobcentre that was not part of co-location to act as a control group. We put Careers Advisers in both but with the control office we didn't do the branding, or make it look discrete. When comparing both we found that the branding didn't

make a difference to the volume of customers seen. What makes the difference is the staff presence and the relationships on the ground.'

Prime Contractor

Establishing a branded area

There was a branded area in each of the Trial sites visited but there was significant variation in the way in which the Trial areas interpreted the brief. The branded areas observed included:

- the use of National Careers Service sail banners to distinguish the desk used by the Service Adviser;
- the installation of partitions, posters, leaflets and/or television screens in reception/ waiting areas; and
- a fully integrated National Careers Service 'concession' within the Jobcentre - as envisaged in the original vision.

The position as well as the number of branded areas within Jobcentres differed between sites. In some, the branded area was located in a prominent position such as the entrance lobby. As well as raising awareness of the existence of the Service amongst all customers as they entered the Jobcentre, this has the added potential benefit of facilitating access to the Services for casual callers, including non-Jobcentre customers. However, the design and layout of some Jobcentres prevents the establishment of a discretely branded area for the National Careers Service in, or close to, the entrance lobby.

Where it was not possible to locate the branded area in the main entrance lobby, it was located elsewhere on the ground floor or on the upper floors in close proximity to relevant Jobcentre Advisers. The potential advantage of this arrangement is that it helps to facilitate closer links between the Advisers working for the respective services. However, as customers are not permitted to pass through reception onto the carpeted area within Jobcentres without an appointment, this model is likely to limit access for casual callers.

Some of the Jobcentres visited operate over a number of floors. Although it is not possible to ensure a discrete presence for the National Careers Service on every floor in all cases, there is evidence that the Trial areas are utilising a range of promotional devices to raise awareness and signpost customers to the relevant place.

The research revealed, therefore, that the location of the designated area depends on a number of factors including the available space, office layout and workflow, and views on the extent to which the service should be accessible to the wider public. In addition, the installation of resources, such as television screens, and infrastructure, such as interview pods, in order to create the discrete area generated a number of issues which, in some cases, resulted in frustration and substantial delays to delivery. The time involved in planning, risk assessing and implementing changes of this nature was often underestimated. The delay could have been reduced had Telereal Trillium been engaged at an

earlier point in the Trials and ordering materials approved under the Jobcentre Plus Environment Guide (JPEG)³ rather than seeking to source materials locally.

2 Full-time access

The Trials were required to provide full-time access to Next Step services within Jobcentres. The guidance indicated that a full-time presence could be achieved in a number of ways, for example: an IT terminal providing access to the web channel; a direct dial telephone providing access to the telephone channel; and/or an Information Adviser to supplement the work of Careers Adviser/s.

Access to face-to-face services

It is clear from the research evidence that the availability of face-to-face advice greatly increased during the Trials and was regarded as the primary route through which customers would access the Service. In most cases, this involved increasing the number of working hours for an existing co-located Next Step Adviser from part- to full-time. At sites where co-location was previously on a full-time basis, the number of Advisers doubled on certain days and at least one site reported that three Advisers were available at certain points in the week.

Only one of the sites visited did not have a full-time Careers Adviser on site. In this instance, the full-time presence was achieved through a combination of web and telephone access, a full-time Information Adviser and a part-time Careers Adviser. Although the model appeared to work successfully, a concern was raised that customers who attended the Jobcentre on 'signing-on' days, when the Careers Adviser was not present, were not able to access face-to-face services as readily as those who attended on the days when the Careers Adviser was present.

Formalising the co-location arrangements and, in particular, the increased face-to-face presence of Careers Advisers and Information Advisers, was welcomed by Jobcentre colleagues. Prior to the Trials, demand for career guidance exceeded the available resource in some sites and as a result they reported experiencing a backlog and long waiting times for appointments.

Access to the telephone channel

Public access telephones were located in all the Jobcentres visited. Customers could use these telephones to access advice via the National Careers Service telephone channel, as well as to make appointments to see a Careers Adviser at the Jobcentre.

However, only half (4) of the Trial sites visited provided a 'warm phone' (i.e., one providing a direct/speed dial facility through to the National Careers Service). In the best situations, there was a specific notice indicating that customers could use the phone for this purpose. However, too often the information was not clear or out of date (e.g. referring to the previous learndirect service).

³ See: <http://www.dwp.gov.uk/jpeg/about-jpeg/>

Jobcentre Advisers' understanding of the role of the telephone channel, and of the services available through it, appeared variable, with only one notable exception. In this Trial area contacts with the telephone channel were highly developed. Jobcentre Advisers had visited the telephone channel contact centre and Advisers from BSS (the contractor delivering the adult telephone channel) had visited the local Jobcentre to promote the service.

Overall, Advisers recognised the value of aspects of the telephone channel, in particular, the out-of-hours service and the service provision for speakers of other languages.⁴

'We have an increasing number of referrals where somebody just sits down and smiles and says, 'No English,' this is where the telephone service would come into its own.'

Careers Adviser

'I always sell the telephone channel...because they have funding advice across the whole country, whereas often your Careers Adviser can be quite localised in the advice that they give. Also the out-of-hours service, I think that's one of the key selling points of the telephone line, because they're able to go away and use it at home'.

Information Adviser

A few Jobcentre Advisers questioned why anyone would want to refer customers to the telephone channel *'when there is a face-to-face service available locally.'* It was suggested that more use of the telephone (and web) channels may be made if the waiting time for a face-to-face appointment was too great. However, there is limited evidence that this option was routinely taken up and a lack of robust management or traffic information to substantiate this.

Access to the web channel

Customers were able to access the National Careers Service website while at the Jobcentre in half of the Trial sites visited; two sites indicated that this service would be available by September 2012. Varying levels of support with the website was provided by Careers Advisers and Information Advisers.

In most cases, access to the website was provided through public access PCs/IT terminals. The location of the public access PC appears to be a key consideration. At one site, a dedicated public access laptop was located next to the Careers Adviser's desk. However, it was reported that it was rarely used, despite it being promoted by the Careers Adviser and the Information Adviser based on the floor below.

There were varying levels of awareness of the National Careers Service web-channel amongst Jobcentre Advisers. In the best examples, Advisers reported that they frequently

⁴ The National Careers Service is a freephone number and so is chargeable to those phoning from a mobile, which may cause an issue for customers with no access to a landline phone.

showed their customers the website on their own PC when fulfilling their signposting role. However, in most cases, as with the telephone channel, Jobcentre Advisers were not aware of the range of services available and, as a result, could not adequately explain these to customers.

In summary, the National Careers Service offer in the Trial areas visited was mainly being delivered by Careers Advisers and, where appointed, Information Advisers. In a few areas there were moves towards a more integrated offer - involving appropriate and timely use of the other channels. However, this was only fully developed in one Trial area visited (see Case Study 1 overleaf).

3 Access to broadband and IT systems

The issue of access to broadband and suitable IT systems has been a long-standing concern for Next Step staff operating in Jobcentres prior to the Trials. Trials were required to provide Next Step staff with access to broadband and appropriate IT systems, in particular so that they could access the Next Step Customer Relationship Management (CRM) system and make effective use of the Skills Health Check Tool and other elements of the web offer. It was suggested that this could best be achieved through existing Jobcentre Plus IT systems, or alternatively by installing broadband connections.

An audit of the evaluation sites was undertaken to assess IT access. The results indicate that internet connectivity was available to Service Advisers in all Trial areas via broadband and/or 3G access. One site indicated that broadband was not necessary because 3G access via 'dongles' was sufficiently robust not to impact on delivery. However, the internal review of best practice and lessons learned by the Skills Funding Agency and DWP concluded that *"3G access was to the internet is not a viable alternative to providing internet access"* (Healey & Milner, 2012:1) as, in most cases, it failed to deliver the necessary speed and reliability.

The installation of broadband into the Jobcentre required a co-ordinated effort on behalf of Telereal Trillium and BT - the ICT provider - and this again led to delays in some locations. Once installed, most Careers Advisers accessed the internet via Service-owned laptops which Advisers also used when completing documentation and/or with customers. There was some evidence that Advisers had 'pseudo access' to Jobcentre Plus systems (e.g. the Jobcentre Plus intranet) but were not able to save data or send e-mails. In addition, 'pseudo access' was only available from a Jobcentre PC and not from Service-owned laptops.

Case study 1: Integrated access to all channels

Customers were able to access all three channels of the National Careers Service through the co-located provision in one Jobcentre. The discrete branded area in the entrance to the Jobcentre encompassed a dedicated desk from which the face-to face service was delivered, a National Careers Service PC terminal with internet access and printing facilities, and a bank of customer telephones. The aim was to provide an integrated and seamless service for customers who were signposted as well as mandated to the Service.

Jobcentre Advisers were made aware of the PC and were provided with an overview of the National Careers Service telephone channel and website functionality, including the CV builder. During the Trials, both Jobcentre and Service staff signposted customers to the website and other agreed websites to aid them in their job search.

The introduction of the PC terminal successfully raised awareness of the web channel amongst Jobcentre Advisers and increased their knowledge and understanding of the website. It is also perceived to have helped reduce the rate of referrals to the face-to-face channel for customers who were only in need of CV support in the first instance.

'A lot of the advisers now have a lot more knowledge of the service than they did before. Often Next Step was seen a CV referral, so people would refer for CVs....we don't have that issue anymore as they know there's a computer there to refer to for CV support. The actual careers advice is being used more appropriately.'

Information Adviser

The close proximity of the Careers Adviser to the PC terminal and the customer telephones, coupled with the presence of an Information Adviser undertaking the role of 'floor walker', was also regarded as beneficial for customers. Those who were experiencing difficulties with the website or who had ad hoc queries which could be dealt with by the telephone channel could be easily identified and supported.

Finally, Jobcentre and National Careers Service colleagues noted that the availability of National Careers Service printing facilities, which included a supply of higher quality paper, also brought considerable benefits. Customers were able to use the facilities to print professional looking CVs which they could then forward to prospective employers.

4 Access to private interview facilities

When implementing deepening co-location, Jobcentres were asked, to the best of their abilities, to allocate suitable office space for the delivery of career guidance sessions. The guidance indicated that where private interview rooms were not available, Prime Contractors should work with Jobcentre Plus to secure an area where interviews could be conducted undisturbed.

The internal review of good practice and lessons learned found in some sites that separate specially-developed interview areas/rooms (e.g. pods) were perceived to be a '*perfect solution*' to deliver a discretely branded area (Healey and Milner, 2012:2) . In other sites, these structures were perceived to be a '*barrier to closer working*' (*ibid*). The review concluded that flexibility is particularly important in relation to the provision of interview space and recommended that sites should be allowed devise an appropriate approach that best fits their location. However, it also stated that it was important for offices to take account of Ofsted feedback that criticised the lack of customer privacy within open-plan Jobcentres. Shared private interview facilities provide an acceptable solution where the installation of a dedicated pod is not possible, or desirable, accompanied by a clear system for booking and prioritising between customer and other groups (e.g. employers).

Access to private interview facilities was available in all the areas visited, with Trial sites addressing this requirement in one of three ways:

- Model 1: The allocation of dedicated desks at the Jobcentre with the option of a private interview room/s through advanced booking. This was found to be in operation across six of the Jobcentres visited.
- Model 2: The allocation of dedicated desks located within a partitioned area / pod. This was found to be in operation in one of the Jobcentres visited.
- Model 3: The allocation of dedicated desks in a fully-enclosed office / pod. This was found to be in operation in one of the Jobcentres visited (see Case Study 2 overleaf).

Systems for prioritising the use of private interview facilities appeared to be largely ad hoc and customer feedback suggested that the option of a private interview space was not routinely offered. One Trial area made it clear that interview facilities were available to all on a 'first come, first served' basis but that priority would be given, for example, to local employers who wanted to use them for selection interviews. In the event that a customer requests a private interview space when one is unavailable, Careers Advisers indicated that they would be willing to reschedule their appointment. However, they also expressed concern that customers may be reluctant to come back several days later and that this could impact the Failure-to-Attend (FTA) rate.

Case Study 2: Branded Interview Pod

One Trial site installed a fully-enclosed, National Careers Service-branded, interview pod in the reception of the Jobcentre. The introduction of the pod was regarded as an opportunity to increase the visibility of the Service:

'We all agreed that the pod would be one of the best options that we could provide here that would make it look different from other Jobcentre and also inform the public as well that we're coming in, that it was actually National Careers Service that was going to be here.'

Service Lead

Colleagues at the site also regarded the introduction of the pod as a way to mitigate prior concerns about the lack of privacy in an open-plan office.

Following a series of meetings between Jobcentre Plus, National Careers Service and the facilities management company, the fully enclosed, branded glass pod was installed in the reception area. In addition, to further enhance the visibility of the Service, uniformed Careers Advisers and an Information Adviser worked in the pod and supported clients in the reception area where two National Careers Service open access PCs were also located.

There was a general consensus that the introduction of a dedicated and confidential area had increased the volume of customers accessing the Service. Careers Advisers noted in particular that the location and presence of the pod had increased the flow of ad hoc enquiries from customers as well as referrals from Jobcentre Advisers.

Both customers and Careers Advisers reported that the pod had also made a 'significant difference' to the quality and effectiveness of the intervention. Service staff commented that customers appeared more relaxed in the confidential environment and were willing to disclose further information about the factors that were impacting on their job search, their career aspirations and their ability to secure employment.

'I feel that they can just open up a bit more - what they want to do, what they've done in the past - because they know that no one else can hear in the pod. I think it builds up the trust relationship as well.'

Careers Adviser

'I think people who are not familiar with the Jobcentre can be quite intimidated by it. They often say that [the pod] makes them feel safe and protected and that they feel much more willing to talk... it's a place where you can delve a bit deeper and find out if there's any other barriers. I think that's a massive plus from a careers guidance point of view.'

Information Adviser

Staff and customers' views on the importance of private interview facilities for effective service delivery also varied. In some cases, Careers Advisers indicated that: *'customers are quite happy to be interviewed at open desks as they are when they are being seen by Jobcentre staff'*, adding that *'they are used to it'* and *'don't want to be singled out'*. As a result, Careers Advisers reported that they rarely received customer requests for private interview facilities. However, other Careers Advisers argued that having private interview facilities is *'crucial'* and, as noted above, are a *'requirement for Ofsted'*. None of the customers consulted reported that they had been explicitly offered a private interview space but most were comfortable conducting the interview in an open plan or screened environment. However, for a minority of customers the lack of privacy was perceived to be one of the main disadvantages of co-location. One commented *"you can hear other conversations - so others can hear you"*. This made them feel uncomfortable and inhibited what they said. The customers who shared this view tended to be professionals and those who were less familiar with the Jobcentre and the environment in which it operates.

In summary, Trial areas have been able to accommodate the requirement for private interview space through a range of approaches, including in one the provision of a fully enclosed pod (Model 3; see Case Study 2 below). A minority of Service leads were reluctant to invest in facilities such as this - *'if it costs more, then I'm going to say no'* - especially if there is limited demand from customers and if existing facilities (Models 1 and 2), with the appropriate systems in place, offer a viable alternative.

5 Closer working between Jobcentre and Next Step Advisers

A key aim of co-location was to develop closer working arrangements between Jobcentre and Next Step colleagues in order to facilitate activities such as joint case working, joint training and information sharing. The hope was that closer working would also increase Jobcentre Advisers' understanding of the service offer with a view to improving the quality of referrals and signposting.

There is evidence to suggest that joint activities, including meetings and training, have increased since the Trials were implemented. This has been particularly helpful in areas where working practices were previously not well-established:

'To be honest, we didn't refer to Next Step to any extent at all, unless it was trying to do a CV. That's something that has totally changed. So, for me as it's gone on, the Trial has been about increasing the range of uses of the National Careers Service.'

Jobcentre Adviser

In general, as a result of the Trials, Service staff feel more integrated. Measures such as having security cards, a dedicated desk and a locker at the Jobcentre make them feel 'part of the team'. In some areas, smarter ways of working have been developed, communication between the services has improved, and Advisers have a better understanding of their respective roles, responsibilities and remit.

'I've learnt about the Jobcentre's role in different areas as well, because of obviously sitting next to the Advisers, finding out what they do. So they've got a better understanding of what I've done, as I have about what their roles are.'

Careers Adviser

Nevertheless, it is important to recognise that in areas where working practices were already well-established (although not necessarily optimised) it is more difficult to discern the extent to which closer working had been achieved as a result of the Trial. Where this was the case, typical comments included: *'It's just a case of doing more of the same'*; *'Really not sure why we were selected as a Trial area'*.

Partnership working and co-location of services is frequently challenging - particularly where the organisations are significantly different in terms of their size, governance structures, resources and remit. One of the key stakeholders consulted highlighted the need for, and also the challenge of, 'aligning cultures' in order for joint working between Jobcentre Plus and the Service to be effective, and this was echoed during visits:

'I think the two organisations have got slightly different remits. We're [Jobcentre Plus] looking for a service to be provided so that our customers can get what they need and we can move them off benefit quicker. For them [National Careers Service] it's around the Lifelong Learning Accounts and getting people more engaged in learning. We just want them [customers] to up-skill themselves if they need it, but be able to take any job they can do. If they want to go on to learn something else in the future they can do that, but they must take the immediate job now. So, there's a bit of a difference'.

Jobcentre Plus Lead

Where co-location is working well, there is on-going discussion between Jobcentre Plus and National Carers Service Leads and Advisers to resolve the tensions between their respective roles and remits, so that they can work together and improve outcomes for customers as well as support the achievement of organisational objectives. This has led to increased confidence in making referrals to the Service:

'I think it's reinforced the message to us that there's lots of help out there and we can signpost customers to them...that we don't need to have all the knowledge in our head. It's a partnership effort to work with customers and help that customer move along the journey because we can't do it all in our space so I think that's something that we've learnt by having them here.'

Jobcentre Adviser

‘Just to have someone there who is knowledgeable about youngsters really, about when they come out of school, what courses are available. People that have had to retrain, we have had a couple and they have gone to see the Careers Adviser, and have been put onto courses and have been successful in gaining employment and sustaining employment in other avenues which has been down to the careers advice’.

Jobcentre Adviser

Only a minority of Jobcentre Advisers reported that they lacked confidence in the Service and/or commented that they had been disappointed with the quality of service provided. Most welcomed the additional support from both Careers and Information Advisers (where in post) and could point to examples of good working relationships which were benefitting customers.

Summary

The Trial sites visited as part of this research have approached, and met, the five minimum requirements set by the Skills Funding Agency in a range of ways. There is evidence of innovation, but what is most striking in the majority of cases is the tenacity and determination of all partners to develop creative solutions, overcome the challenges, and make co-location a reality. As a result, there is now a greater awareness and understanding between the two organisations and, in areas where practice is well-developed, a clear basis on which to develop more integrated service delivery.

The provision of a **discrete branded area** was perceived to be ‘beneficial’ in terms of: alerting customers and staff to the availability of the Service; legitimising the presence of Careers Advisers and providing a permanent, recognised base in which to work; and making Careers Advisers feel part of the team. Overall, the staff consulted reported that having a permanent, designated area in which to operate was more important than having the space branded ‘Next Step’ because of the relatively weak brand recognition amongst customers. Advisers were positive about the introduction of the National Careers Service, and the re-branding of discrete areas, but the impact of the National Careers Service brand in this context will need to be established.

Although **full-time access to the National Careers Service** appears largely to have been achieved, the default position in the Trial areas visited was for customers to be referred and/or signposted to the co-located face-to-face service rather than to the telephone or web channels. Where wider and more integrated use was made of the other channels (e.g. customers accessing National Careers Service web-based tools prior to seeing an Adviser), this was achieved through detailed local planning, rather than as a result of simply ensuring the resources were available.

Internet connectivity was available to Service staff in all Trial areas via **broadband** and/or 3G access. In most instances staff utilised Service-owned laptops and PCs and access to other **IT systems** was limited. Although there were examples where Service staff were issued ‘pseudo-identities’ to enable them to access Jobcentre intranets (including, for example, Knowledge Hub), this involved logging onto a Jobcentre PC. The evidence demonstrates that the systems continue to operate in parallel and additional work is required before they can be further integrated. Greater integration would offer considerable

benefits, including helping to facilitate data sharing between the two organisations and creating a more efficient working environment.

Opinion was divided on the importance of **private interview facilities** and the impact they have on the customer experience. Some perceived that the addition of a 'pod' was an unnecessary expense because the majority of clients were used to and were comfortable in an open-plan space; others perceived it to be a prerequisite for effective, impartial guidance because it provides a safe and confidential environment in which to share personal information which may be pertinent to the customer's current job search and longer-term career aspirations. Although this model offers recognised benefits for both the Careers Adviser and the customer, it is also costly. Furthermore, it is difficult to accommodate in smaller offices and creates a number challenges, particularly in relation to planning and installation.

Finally, in regard to effective **joint working**, it is clear that this is central to the success of co-location. The nature and depth of joint, or partnership, working has varied across the Trials and, in some, limited progress has been made from the baseline position. However, in the best examples, it has enhanced joint-working, led to new approaches to service delivery (see Section 3), and improved outputs and outcomes (see Section 5). However, additional work is required, building on the minimum requirements, to ensure the potential of co-locating National Careers Service staff in Jobcentres is fully realised.

3 Approaches to co-location

National policy has specified how Jobcentre Plus customers should be referred to the National Careers Service. This section explores the systems and approaches that have been developed through the Trials to support the successful implementation of co-location.

Introduction

The achievement of the five minimum requirements was underpinned by the development of a range of systems and processes that were created and/or refined by Jobcentre and Next Step colleagues through their involvement in the Trials. The systems and processes were introduced primarily to support and encourage co-operation between staff working for the respective organisations, facilitate a better understanding of each other's services, and contribute towards the development of a more joined-up service for customers.

The key systems and processes that support the different stages in the customer journey are outlined below, along with some of the differing approaches adopted by the Trial areas. The issues and challenges of developing and implementing appropriate systems are also examined. However, we first explore the role of the Information Adviser and consider the ways in which this function supports joint working and helps to overcome some of the issues and challenges of co-location.

The role of the Information Adviser

A number of the Trial areas submitted proposals for an Information Adviser in their Joint Implementation Plan. Of the eight sites that participated in this summative evaluation, five successfully secured the resources to appoint an Information Adviser. Three sites had full-time support; in the remaining two, the Information Advisers worked three days a week. In one instance, the Information Adviser worked across two Trial sites in the region. All except one of the Information Advisers had a guidance or counselling background and two were qualified Careers Advisers.

Unlike Careers Advisers operating within the Next Step Funding Model, the funding for Information Advisers was not dependent upon the delivery of specific activities or outputs. As a result, they could be deployed flexibly to meet local needs and circumstances. The extent and nature of the role varied considerably between Trial sites and the Information Advisers assumed varying levels of responsibility. This was typically dependent upon how long they had been involved in this area of work, the activities they were expected to undertake as part of their role and the level of experience needed to undertake them. Only one of the Information Advisers consulted recalled being given a job description at the beginning of the Trial; the rest regarded the job as one that evolved in response to the needs of the Trial.

The Information Adviser with no guidance experience or related qualifications fulfilled a largely administrative role. Their primary responsibilities were booking appointments and managing clerical diaries, typing up customer CVs, and signposting customers to the telephone and web channels. Where the Information Advisers had more relevant

experience and/or qualifications, the role functioned in a more integrated way with the service provided by the Careers Adviser. These Information Advisers were proactively involved in activities designed to engage Jobcentre customers with the Service such as 'floor walking' and promoting and signposting customers to the different channels and resources. 'Floor walking' proved to be an effective mechanism for raising awareness as well as helping to address any misconceptions about the Service which could act as potential barriers to access:

'I would go and talk to customers while they were waiting to be seen and would provide information about our services and how they could access it. A lot of people, as you can imagine, would be quite, 'I don't want to know about that,' but with my patter I can actually sit down and talk to anyone, they would come to realise in actual fact they could benefit from seeing somebody and then start to see a way forward.'

Information Adviser

Information Advisers were also engaged in activities to ensure that customers were prepared and arrived for their appointments. Good practice in one Trial area involved the Information Adviser telephoning and sending text reminders to customers in advance of their interviews to boost attendance and help reduce the Failure to Attend (FTA) rate. When customers did fail to attend, they would ascertain the reasons and then rebook their appointment if appropriate. The positive impact that the role of the Information Adviser can have on FTA rates was previously recognised in the internal review of good practice and lessons learner and confirmed by Jobcentre Plus Leads who participated in this research:

'We saw the Information Adviser as one of our team so she spoke with us, attended our meetings and explained what Next Step was offering. So we were referring a lot of numbers of customers to her and she was getting nearly zero amount of 'failed to attends', because every customer who went there...because they wanted to go, not because we were telling them, 'You have to go and see this provider.'

Jobcentre Plus Lead

Once referred, the Information Advisers fulfilled a vital role in preparing the customers for their intervention. They provided customers with an overview of what would be involved in the face-to-face session and encouraged customers to think about what they wanted to achieve in advance. Information Advisers also helped customers open a Lifelong Learning Account and provided support with resources such as the Skills Health Check or CV builder:

'Although I'm not doing advising, I think it does help... because there's no way you could sit there and show someone how to use a CV builder without talking to them about their CV. So although I'm not doing a lot of advice, I would touch on things.'

Information Adviser

Information Advisers were frequently involved in follow-up activities to support and encourage customers to take forward their action plan as well as recording outcomes. In one instance, they were responsible for analysing management information on the take-up and usage of the different Service channels. As noted above, the unique way in which the

Information Adviser post was funded meant that they could be used flexibly and were free to respond rapidly to ad-hoc queries from customers and Jobcentre staff, particularly when the Careers Adviser was engaged in a guidance interview with a client. Finally, in addition to the help for customers, Information Advisers in some sites also provided vital support for staff. For example, one Information Adviser contacted and visited a local training provider to review their provision on behalf of the Careers Adviser:

'I'll go and see for myself exactly what the resources [training provision] are like. Whether there's employment at the end of their courses, what courses, and are there any gaps for us to get in there and do some careers advice.'

Information Adviser

In addition, the evaluation has confirmed the findings of the internal review of good practice and lessons learned that the regular presence of an Information Adviser has a particularly positive impact on partnership working and helps to ensure effective liaison between Jobcentre and Service staff.

'It was to up to me to school them, so that they [Jobcentre Advisers] could show customers how to showcase the website tools, how to sell the telephone channel, how to sell the face-to-face service, so we're getting correct referrals.'

Information Adviser

In summary, although not all the Trial areas had an Information Adviser, and where they were in place the role and function varied considerably, the evidence suggests that they brought considerable benefits overall. Information Advisers performed essential administrative duties which helped to ensure appointments were scheduled appropriately and were accompanied by the relevant documentation. However, the role added most value when the post-holder had a guidance-related background or qualification. In these instances, the Information Advisers were fully integrated into the customer journey which enhanced the process for both customers and Advisers and helped to ensure time and resources were used effectively and efficiently (see Case Study 3 overleaf).

'I would see people that turned up and explain what the service was all about so that the Advisers' time was freed up to actually go into the discussion straight away rather than spend 15 of the 45 minutes having to go through who we are, what we do and how the service is offered.'

Information Adviser

Although it is difficult to establish a causal link, there is a widespread perception that Information Advisers helped to reduce FTA rates through their pro-active engagement with customers before, and immediately following, their referral. Through this process they help to develop customers' awareness and understanding of the offer, prepare them for their intervention, and encourage them to attend. Two respondents to the customer survey who did not benefit from any additional preparation or follow-up suggested that that this type of support would have been valuable, particularly prior to being seen by the Careers Adviser.

Case Study 3: The role of the Information Adviser

The Information Adviser at one Trial site was fully integrated into the customer journey and made a significant contribution to the enhanced customer experience through their involvement at key stages in the guidance process. This included: drawing customers' attention to the looping advert about Next Step on the flat screen television in the waiting area to raise awareness; developing customers' understanding of the Service and how it could help them; and actively signposting customers to the different channels. However, it was the wider support provided to Jobcentre and Careers Advisers that was perceived to add particular value, which would not have been possible in the absence of the Trial.

In addition to the support for customers, the Information Adviser was responsible for: co-ordinating co-location marketing activities; gathering intelligence on customer demand for careers advice; and evaluating the extent of the Jobcentre Advisers' understanding of Next Step as the Trials progressed. The visibility of the Information Adviser role and the extent of their pro-active engagement with customers and Jobcentre staff meant that they were ideally placed to undertake these wider activities to support deepening co-location.

The research undertaken by the Information Adviser led to recommendations on the most effective ways to promote the Service. It also generated valuable insights into levels of customer awareness, views on Next Step, the likelihood that customers would use the Service again in the future, and the type of support they would find valuable. The data was disseminated by the Information Adviser at Jobcentre team meetings and was used to inform practice as the Trial developed.

A survey of Jobcentre Advisers at the beginning of the Trial helped to ascertain their awareness of the Service and the extent to which they were promoting it to customers. This provided a valuable benchmark against which to compare the findings when the survey was repeated a few months later. The research demonstrated a dramatic increase in awareness amongst Jobcentre staff as well as in the number of referrals:

'At the beginning we asked 'Did you know that we were working in the Jobcentres?' I would say that at least 50% didn't know. Then, 'Have you ever promoted our services through your own advisory sessions?'What was most interesting was they didn't realise they could directly refer. After two months or three months I did the same survey and the increase was phenomenal because they'd got to know us and got to know of our services.'

Information Adviser

Communication systems

Good communication is essential for effective partnership working. Regular attendance at, and active participation in, Jobcentre 'Comms' meetings by Next Step staff helped to improve communication and raise awareness of the offer. Prior to the Trials, the presence of an Adviser at these meetings was typically ad-hoc. Regular attendance at meetings, coupled with the branding and a fixed location for the Adviser within the Jobcentre are regarded as critical in making the Service more visible and ingrained in the minds of Jobcentre Advisers. It also helped to build rapport between staff and ensure all staff were appraised of policy or operational changes that could impact on their joint working.

Jobcentre Plus is a key source of robust Labour Market Information (LMI) which is essential for effective guidance (Diamond *et al.*, 2012). A further benefit of co-location is the opportunity it affords Careers Advisers to access 'hard' LMI through the vacancy database as well as 'soft' LMI through enhanced opportunities for communication with Jobcentre Advisers who are in regular contact with local employers and understand the local labour market. These mechanisms are regarded as having a positive impact on service delivery and, ultimately, outcomes for customers.

'I can access the vacancies that come through the Jobcentre that we wouldn't have otherwise been aware of. If I was sitting in the library I wouldn't be aware of the vacancies that are coming through here.'

Careers Adviser

In addition, Careers and Information Advisers delivered dedicated 'awareness raising sessions' at the beginning of the Trials to Jobcentre Advisers in many areas which were designed to promote the service and explain the different channels (i.e., face-to-face, telephone and web). In one instance, this involved a visit to the telephone helpline contact centre; in another, it involved a demonstration of the website and the opportunity to shadow a Careers Adviser using the website with a customer. Jobcentre Advisers who have benefited from training of this nature reported feeling fully informed about these aspects of the Service and were confident to signpost customers to them. However, in spite of these pockets of good practice, awareness of these channels amongst Jobcentre staff remains variable, with a small number reporting that they had no awareness of them at all. As a result, signposting to these channels was patchy overall.

Information Advisers also reported that they had delivered specific training sessions on the CV builder and Skills Health Check tool to improve Jobcentre Advisers' understanding of these resources. These sessions improved awareness amongst Jobcentre staff and were perceived to give rise to an increase in both the number and quality of referrals during the Trials.

Maintaining a regular presence at Comms and other meetings presented a key challenge for Prime Contractors, not least because the opportunity costs involved in not seeing a client militate against Careers Advisers attending meetings of this nature. Where they were in place, Information Advisers offered a partial solution as they were often able to attend on behalf of the Careers Advisers and report back. In addition, frequent changes in Jobcentre personnel mean that there is an ongoing need for 'awareness-raising' and

training sessions for new staff. Given the ratio of Jobcentre Advisers to co-located National Careers Service staff, this also presents a challenge and a key consideration as co-location is rolled out. Providing information on the Service as standard in Jobcentre staff inductions may be one relative cost-effective way to overcome this.

Administrative systems

The development of effective administrative systems, in particular for booking appointments with the National Careers Service, was crucial to the success of the Trials. Trial sites adopted a variety of approaches ranging from paper-based clerical diaries, through electronic spreadsheets, to the use of the telephone channel.

A clerical diary was introduced at one site because of problems encountered with the electronic system, including staff being frequently 'locked out' of the spreadsheet by other users. In addition to overcoming this issue, the key advantages of the clerical diary system are perceived to be that the Jobcentre Adviser takes ownership of the referral and the risk of double booking is reduced. In some areas this process was overseen by an Information Adviser to minimise the risk of the diary being moved or going missing. The Information Adviser was also responsible for updating the diary with the appointments booked remotely through the telephone channel.

The clerical diary had been replaced by an electronic system in other Trial sites. However, the lack of shared access to a single IT system meant that bookings were taken over the telephone and managed by an Information Adviser. While more efficient than a paper-based system, the success of the process is dependent upon having an Information Adviser (or equivalent) in post and a system in place to ensure telephone calls are diverted to the Service Adviser's desk in the event that the Information Adviser is unavailable to take them.

In the most effective system observed, the limitations of the other systems were overcome through the introduction of an external 'helpline' service managed by the Prime Contractor through which both Jobcentre and National Careers Service Advisers could book appointments on behalf of customers.

Although all Jobcentre Advisers have the option of booking appointments with the National Careers Service through the telephone channel, very few indicated that they were aware of and/or used this system. Most Advisers reported that they preferred to deal directly with National Careers Service staff, either through the diary system or in person. The National Careers Service Advisers also welcomed the opportunity to work in this way because it allowed them the flexibility to react to issues as they arose. This included backfilling appointments when customers failed to attend and seeing customers on the same day as their referral.⁵

⁵ The telephone service can only make appointments for the following day.

Referral systems

Jobcentre Plus has clear written guidance about both ‘signposting’ and ‘referring’ customers to the National Careers Service. The guidance states that referral to the National Careers Service should be considered where JSA and ESA (WRAG) claimants’ skills-needs are less clear and the claimant has one or more of the following:

- A poor employment history.
- Outdated skills.
- An employability skills gap.
- A lack of understanding of their current skills levels and those required by the labour market.

It is clear too that: ‘Any Non-JSA or ESA (WRAG) claimants (including Rapid Response customers) can still be referred to National Careers Service, but it will not be a mandatory referral’.

Claimants who have been signposted to the Service but do not take up the offer can also be referred if an Adviser feels a formal referral is then appropriate, as can customers who are judged to be lacking in motivation and/or confidence. As indicated, customers who do not meet these criteria and have other support needs, such as help with their CV, should be signposted to the telephone and/or web channels.

Mandation leads to auditable procedures that have to be put in place, including the use of Ref2 referral forms. A Ref2 form must be completed by the Jobcentre Adviser for all referred customers which is then shared with the Service Adviser. This system did not always appear to operate smoothly, however. It was frequently reported that the arrangements were ‘cumbersome’ and ‘generated paperwork that would be better transmitted electronically’. At two sites the Information Adviser co-ordinated the flow of the Ref2 forms between the two services to ensure that the forms were received in advance of customer appointments and returned securely. It also helped to prevent forms being sent (by courier) ‘to the wrong locations’ (e.g. Prime Contractors’ offices rather than to the relevant Jobcentre).

A key drawback of the form, however, is that there is limited scope to provide information about the reasons for referral. In the absence of this information, Careers Advisers must ascertain the reasons from the customer which may or may not reflect the Jobcentre Adviser’s intentions for them and also impacts on the time available for the intervention. In some sites parallel systems have been developed to enable Jobcentre Advisers to provide further details of the referral. In one case this involved an additional column on the electronic diary; in another it was a separate form. In both instances the systems were not widely used because of the duplication of effort involved and the limited time Jobcentre Advisers have available to complete documentation of this nature. Further duplication of effort was observed in relation to the production and sharing of action plans. Concerns were raised by staff and customers that similar information was being collected from customers by both services. This was regarded as an inefficient use of time and a source

of frustration by both parties. Some areas have, however, begun to address this and the referral issue with a single process⁶:

'One of our concerns that we had with the action plans is that there was duplication because the National Careers action plan is required to be filled in. It's a carbon copy of our action plan with the customers. So, we sit for 40 minutes with a customer, refer them to National Careers who sit and do the same interview and gather the same information. So, we'd agreed a process whereby we attach the action plan that we've done to the referral and we state very clearly on the referral what it is we actually want, is it job goals, is it a CV, is it support and help and training in this area so that [the Adviser] has got all the information, he can just verify it if he needs to but does not have to ask all the same questions again.'

Jobcentre Plus Lead

According to DWP guidance, all claimants who are referred to the face-to-face channel in the Jobcentre should be mandated; those who do not meet the skills conditionality criteria should be signposted to the other channels. However, the evidence suggests that this guidance was not always being adhered to. Only four out of the 40 customers who were interviewed as part of this research indicated that they had been mandated to attend, although the majority (33) reported that they had accessed the service after being 'referred' by a Jobcentre Adviser. In addition, the DWP guidance states that 'claimants who only require help with their CV etc. should be signposted to the National Careers Service telephone (0800 100 900) and web-based services (nationalcareerservice.direct.gov.uk) and should not be referred for a face-to-face appointment with a National Careers Service Adviser'. There is once again substantial evidence to suggest that some customers have been 'referred' (i.e. an appointment has been made on behalf of the customer to meet with the Careers Adviser but is not mandated) to the face-to-face channel for a wide range of reasons, including a high proportion for CV support in some sites. When asked what they were told they would receive from the intervention, 18 customers reported that the Jobcentre Adviser had discussed the 'CV service' that the National Careers Service could provide, encompassing help to develop a new CV or reviewing and updating an existing CV.

It is possible that some Jobcentre Advisers use the term 'developing a CV' as shorthand for 'careers guidance' in order to explain the process and the reasons for the referral to customers in terms they understand. This is perfectly understandable given the time constraints Advisers are working within and the difficulties even professionals experience when defining career guidance as a concept. In the context of co-location, some customers might also find it more acceptable to be referred for 'CV help' rather than for 'career guidance'.

There is, however, also evidence that customers are being referred for more appropriate reasons. Nine customers reported that they were told they would receive some form of career guidance which would involve discussing their work options and/or helping them to identify their skill gaps or existing skills that might be transferable into other sectors.

⁶ The example given relates to specific arrangements made for mandated customers in that Trial office. However, the same principle of reviewing processes can equally be applied to other customer groups.

'I had pigeonholed myself into certain areas of work where there was no jobs and we [the customer and the Jobcentre Adviser] felt I could benefit from some careers advice'

Customer

Other customers reported that they were told that the Service could advise them about specific training courses to address immediate skills gaps and/or to help them realise their longer term career goals. Further research may be necessary to explore why, in the light of evidence, the guidance does not appear to be being routinely followed. The immediacy and convenience of the co-located service is undoubtedly a factor, along with a perception that this client group often prefers face-to-face support.

'I'll refer to [a Careers Adviser] because they can relate to the customer... From my personal experience, if I was to do something online or I was to see someone, I would rather see someone because I know I've got a contact, I know that I have somewhere to go to.'

Jobcentre Adviser

However, there are also likely to be a varied range of other reasons, which could include:

- A lack of awareness of the guidance amongst Jobcentre and National Careers Service staff⁷;
- a lack of familiarity with the other two National Careers Service channels;
- a preference for using what one Adviser called 'tried and trusted approaches that work for customers';
- the use of terms such as 'CV help' as a euphemism for 'careers guidance';
- the sheer volume of initiatives and associated forms of guidance:

'the issue we've got with Advisers is they're being constantly bombarded with people coming in every week saying, 'I've got a new service, use me; I've got a new service, use me.'

Jobcentre Plus Lead

Whatever the reasons, a clear implication of the findings is that to increase the appropriateness of referrals attention needs to be given to the ways in which Jobcentre Advisers are briefed and supported to make appropriate referrals. This will need to include:

⁷ Next Step (now National Careers Service) works within operational and other guidance provided by the Skills Funding Agency. However, there was no evidence that guidance comparable to that provided to Jobcentre Plus staff was available, or indeed of the Jobcentre Plus guidance being shared directly with National Careers Service counterparts.

- development of more effective mechanisms to communicate policy at a local level to ensure compliance. This could include the development and dissemination of a 'crib sheet' for Jobcentre Advisers;
- consideration of the roles of other agencies in providing employability services and of the extent to which individual customers can help themselves;
- recognition of the need for increasing customisation and sophistication when producing 'winning CVs' (Eggert, 2007); and
- giving Advisers the language to explain the process to customers in a simple and succinct way. This should have the added benefit of ensuring that customers are adequately prepared for their intervention and their expectations are met.

Summary

Co-location provides opportunities to develop systems and approaches that help to enhance the customer journey and potentially improve outcomes. Improvements in communications and awareness-raising are perceived to have had a positive impact on the number and quality of referrals. A key challenge for existing and newly established co-located sites is continuing to develop and maintain levels of awareness of the National Careers Service in general, and the telephone and web channels in particular, amongst new Jobcentre Advisers. This will need to be underpinned by more effective mechanisms for communicating and ensuring compliance with the guidance on referrals and signposting.

The evidence suggests that the Information Adviser has fulfilled a crucial role in relation to a number of aspects of co-location, but is particularly effective, and adds most value, when the post-holder has a background in guidance and is fully integrated into the customer journey. Although some sites have retained their Information Adviser, some of the gains have undoubtedly been lost when the funding for the post ceased at the end of the Trial; Careers Advisers do not have the resources within the constraints of the current funding model to undertake the beneficial, supplementary work (e.g., preparation, follow-up and research into local training provision) that was previously undertaken by Information Advisers. Creative ways in which this function could be fulfilled should be considered, although it may not be necessary, or financially viable, to employ a full-time Information Adviser in the wider roll-out to smaller sites.

Although the evidence clearly demonstrates that systems and processes have improved as a result of co-location, multiple systems remain which operate with varying levels of efficiency. There is also considerable duplication of effort. A key difficulty is the lack of common IT and other systems and processes that militate against the effective operation of electronic processes, such as an appointments diary and data sharing. There is scope, therefore, to develop more consistent and effective arrangements as co-location rolls out, if measures to streamline systems are considered and piloted.

4 Impact and outcomes

This section explores the perceived impact deepened co-location has had on the customer journey and experience, as well as on organisational outputs and outcomes.

Customer experience

Awareness of the Service Offer

Co-location is perceived to have aided the development of a greater awareness and understanding of Next Step and, latterly, the National Careers Service. All Jobcentre staff consulted were aware of the face-to-face offer and most indicated that their awareness of the telephone and web channels had increased since the introduction of the Trials:

'Before the trial, the telephone and web channels didn't register on my consciousness at all'.

Jobcentre Plus Lead

There is also evidence to suggest that joint team meetings, awareness-raising sessions and staff training during the Trials have helped to challenge misconceptions about the purpose of the Service in some instances, for example, its role in relation to the creation and refinement of CVs:

'I think that a lot of the Advisers now have a lot more knowledge of the service than they did before. Often Next Step was seen as a CV referral - so people would refer for CVs. I think in this office in particular now, we don't have that issue anymore. They know there's a computer there to refer to for CV support.'

Information Adviser

Greater awareness of the Service and the range of provision on offer amongst Jobcentre staff has the potential to enhance both the number of customers accessing the service and the quality of their experience. Research with Jobcentre customers who had accessed the Service through the Trials affirms the important role that Jobcentre Advisers fulfil in raising customers' awareness of the Service. Just over two-thirds (27) of the 40 customers surveyed knew nothing about the Service prior to their first intervention and a quarter (10) knew 'very little' or 'not very much'; only three customers indicated that they knew 'something', or 'a lot'. Of the customers who had at least some knowledge of the Service, eight were aware of the face-to-face channel and six were aware of the website. Just three were aware of the telephone helpline and none of the customers were aware of the web-chat service. Those who knew most about the service were most likely to be aware of more than one channel. The majority had first heard about the Service from a Jobcentre Adviser.

Advantages and disadvantages of co-location

When asked what they perceived to be the advantages of co-location, 35 of the 40 service users consulted (88%) highlighted *'the convenience of Careers Advisers being in the same office'* and *'the opportunity to see an Adviser on their signing day'*. Customers also commented that co-location saved on travel costs, which was particularly apparent in city centre Jobcentres where alternative locations could be a bus trip away.

A minority of customers also valued the opportunity to see a Careers Adviser in an environment that was familiar to them, expressing anxiety at being referred to a service in a location they did not know how to find. A minority of customers who were less familiar with the Jobcentre reported that they found the environment *'intimidating'* because of the presence of *'security staff'* and the nature of some of the other customers. In their view, this and the lack of privacy in open-plan offices were the main disadvantages of co-location.

Staff and customers valued the opportunity to access a Careers Adviser on a face-to-face basis, recognising that some customers lack the confidence to proactively seek help from the telephone or web channel:

'They need to be confident on the phone and be able to communicate effectively. Yes, people can send an email, but that person who's not confident, who's been claiming benefits for a number of years, is not going to make that phone call, and not going to make that website visit. They're just going to think, 'You've given me a leaflet. I'm not going to do anything with it,' I think that face to face just adds that service and value...looking at somebody's body language and being able to talk to them, you get a lot more information out of them.'

Service Lead

Overall, customers perceived that co-location had a positive impact on the service they received and, on average, felt that Jobcentre Plus and the National Careers Service had worked well together to support them.⁸

Customer experience of the National Careers Service

For the majority (37) of customers consulted, co-location was their first experience of the National Careers Service and, at the time of the research, most had received more than one intervention. The majority of customers (37) were able to recall receiving more than one form of careers advice and guidance. Advice on existing CVs, or support to create a new CV, was the most common service recalled by over three-quarters of customers interviewed. Half of the respondents reported receiving support to identify appropriate jobs and help with job applications and interview techniques. 14 customers highlighted that the Careers Adviser had helped them to identify suitable training opportunities in order to realise their career goals.

⁸ Customers were asked to rate the extent to which they agreed that Jobcentre Plus and National Careers Service had worked well together to support them on a scale of one to five, where one was 'strongly disagree' and five 'strongly agree'. Customers provided a mean score of 4.05.

Customers rated the usefulness of the service they received on a scale from one ('not at all useful') to five ('very useful'); on average the service was rated as very useful. Those who had accessed the service more than once rated the service most highly. Customers particularly valued the ability of the Careers Advisers to identify their transferable skills. As a result, customers were able to better target their job searches. They also reported that their confidence improved and their chances of success were enhanced:

'I was going for every vacancy going with no success. The Adviser suggested I use a job profiling system to narrow my search. The next time we met he had printed a list of relevant job applications and we went down and identified the opportunities that would work for me'

Customer

Most customers indicated that the Service met their expectations. However, it should be noted that prior to their first intervention most indicated that they did not know what to expect from the Service, but looking back, felt it had exceeded their expectations.

All customers were asked to consider a series of impact and outcome statements relating to their experience of the National Careers Service and to rate them on a scale of one ('strongly disagree') to five ('strongly agree').

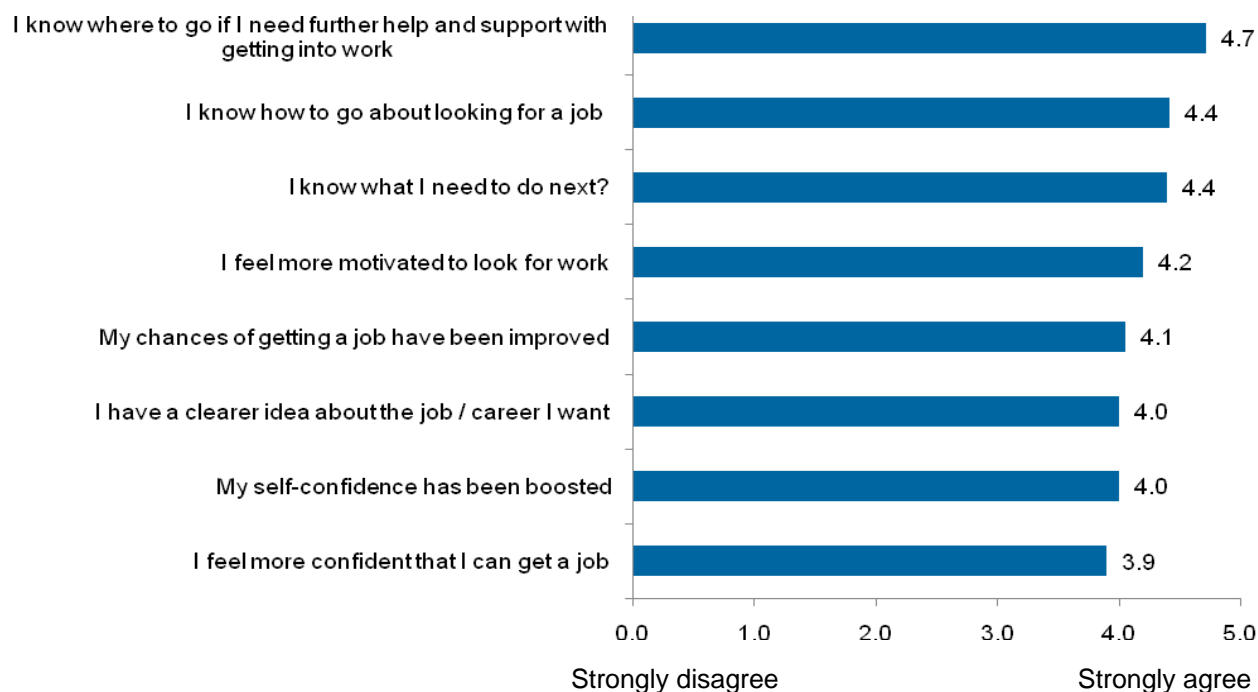
Figure 1 indicates that, overall, customers agreed that using the Service has resulted in a range of positive outcomes. For example, customers report that as a result of using the service they are now aware of 'where to access help and support with getting into work' as well as 'how to go about looking for a job' and 'what they need to do next'. Most also agreed that they felt more 'motivated to look for work' and that their 'self-confidence had been boosted'⁹:

'Now that my CV is better I feel more energised and optimistic about looking for work than before')

Customer

⁹ However, it is important to note that a number of customers reported that they were already motivated and confident, which is reflected in their score.

Figure 1: Customers' views on impacts and outcomes for them since using the Service.



Customers reported feeling least confident 'that I can get a job' following their guidance intervention. However, feedback from the customers who expanded on their reasons for rating this aspect of their experience lower than the other aspects suggests that it is attributable to a perceived lack of suitable jobs and competition for available vacancies, rather than the intervention itself.

The majority of customers (37) rated the National Careers Service as 'very good' or 'good' overall and most would recommend the Service to others. Very few respondents offered any suggestions on areas for improvement; those that were made included:

- *Duration of appointments:* One customer suggested that they would have preferred an in-depth 90 minute session followed by a final 45 minute intervention rather than three appointments of equal length.
- *Preparatory information:* One customer highlighted that they were unsure what to expect from the Service and felt unprepared to answer some of the question raised by the Adviser. *'I would have liked to have known more information in advance of the appointment. I wasn't prepared to deal with what they were asking me.'*
- *Duplication:* One customer reported that they had repeat to the National Careers Service Adviser information that they had already provided to the Jobcentre Adviser. He felt that sharing this information would have freed up time to discuss other areas in more depth.

Outputs

Numbers of referrals

As noted previously, the appropriateness of referrals to the Service was a key focus for a number of the Trials. There was a general consensus that co-location has increased the referral rate and the number of customers accessing the Service due to the increased face-to-face capacity:

'By the end of the Trials I was getting 30 appointments a week. To start with it was 13, but this built it up...in one week I saw nearly 40.'

Careers Adviser

'It's increased massively. Beforehand we had a steady level of referrals, but it increased a lot from the pilot. It just shows that there is that demand there for customers that need it.'

Careers Adviser

In addition, the ability to respond to ad hoc requests increased the number of customers who were assisted and the improved responsiveness of the service. This was particularly valued by Jobcentre Advisers because of the immediacy of the impact for customers:

'I've had instances where perhaps it's for help with a CV, or perhaps it's something where I've requested some advice for a customer, and I've found the Advisers will try and accommodate this.'

Jobcentre Adviser

Appropriateness of referrals

In the most effective practice, the evidence suggests that co-location has had a positive impact on the appropriateness of referrals. In these cases, Careers and Information Advisers perceived that the additional marketing and communications activities undertaken with Jobcentre staff as part of the Trials had resulted in them being better able to assess customers' needs and direct them to the appropriate Service channels:

'Jobcentre Advisers are now making sure that correct referrals are being sent to the right people. So it might not always be necessary that a customer goes to a face-to-face appointment, they may be able to self-help or ring an advisor themselves. So I think that's probably the biggest impact I've seen.'

Service Lead

Overall, however, a lack of awareness of other channels and a lack of consistency in relation to 'signposting' and 'referral' arrangements in the Trials mean that it was far from clear whether customers were accessing the most appropriate services.

As was explored in Section 3, this affected which *customers* were assisted (with referral decisions based primarily on Jobcentre Advisers' assessment of their customer's needs)

and which *services* they received (with a high incidence of referrals to the face-to-face channel for assistance with CVs, rather than signposting customers to use tools such as CV Builder through the web-channel).

Some Advisers raised concerns about the impact of mandation on the delivery of an 'impartial' service to customers referred for skills assessment and related advice concerning their employability:

'One of the big selling points about the National Careers Service is that we were always impartial. Well if you bring mandating into it, it kind of takes away that impartial element.'

Careers Adviser

The question was raised, too, of what level and type of 'skills assessment' is required for referred claimants, and how this is best delivered. Given the prevalence of non-skills-related voluntary referrals, it is far from clear that this was explored through the Trials. Given finite resources, the question of what constitutes an 'appropriate referral' to co-located services will increasingly need to be addressed.

Outcomes

Failure to attend rate

Service and Jobcentre Plus Leads suggested that the Failure-to-Attend (FTA) rate ranged from 20 to 30 per cent (with month-to-month variations during the Trials). Consultations with Prime Contractors/Service Leads indicated that these levels are not untypical, but that in some particularly challenging areas attendance at pre-booked face-to-face interviews with Careers Advisers can be as low as 50 per cent.

Although some data about Failure-to-Attend from the month before the Trials started was made available, this did not provide an adequate baseline. As a consequence, it is not possible to assess with any confidence what impact the Trials had on FTA rates. Nevertheless, there was a general perception amongst those consulted that FTA rates had decreased as a result of co-location:

'I would be surprised if the Failure-to-Attend rates hadn't actually improved, as a result, but I've not seen any figures to tell me, one way or the other.'

Jobcentre Plus Lead

The activities of the Information Advisers were also regarded as having a positive impact on attendance, along with the facility to align signing-on appointments with customers' appointments with the National Careers Service through co-location.

'Quite often we'll try referrals for their signing days, as I said earlier, because there is more of a chance of them actually attending the appointment.'

Service Lead

JSA and WRAG claimants referred to the face-to-face channel are meant to be mandated, which might reasonably be expected to help reduce Failure-to-Attend rates. However, available evidence suggests that FTA rates were higher for mandated customers than for non-mandated customers. DWP Mandatory Programmes Official Statistics (Released June 12 2012) indicate for the period August 2011 to February 2012 there were 151,840 'Skills Conditionality next step referrals', but only 53,810 'Skills Conditionality next step starts', representing an FTA rate of 65%. This is compared with an estimated 70-80 percent attendance for customers who have attended voluntarily. To be able to deliver service, including co-located channels, effectively within a tight funding model, Prime Contractors need to manage key risk factors such as FTA rates. Some fear that if mandated customers continue to be less likely to attend appointments but the number of these referrals increases as a result of co-location, this will have a significant financial impact.

Off-flows

The speed with which customers come off benefit and move into work is a key performance measure for Jobcentre Plus. However, measuring the success of specific initiatives and establishing a link between the initiative and outcomes such as enhanced off flows is extremely challenging and requires a robust baseline as well as ongoing management information. In the absence of this data, some Careers and Information Advisers provided anecdotal evidence of customers who had found employment at least in part as a result of the co-located service:

'I think we've got to the point where we've had people coming in saying, 'Look, we found jobs through this service.' A lot of people have been on training too and, hence have gone onto jobs. So the service is working'.

Careers Adviser

One Information Adviser suggested that a 'steady number' of people had gone into some form of work or learning following the Service intervention. They indicated, however, that a more formal assessment of impact could be made when they followed-up the client six months after the intervention to record their progress and the outcomes achieved.

More generally, staff recognised the potential impact that the Service could have on off-flow rates in the future by providing customers with the career management skills and strategies they need to secure sustainable employment. However, it is apparent that in order to be able to demonstrate impact of this nature, the systems for following-up customers and recording outcomes need to be further developed and improved.

Summary

It is clear that the number of Jobcentre customers accessing face-to-face services has increased as a direct result of the additional capacity and the systems and processes that have been put in place during the Trials. The customer experience is also perceived to have been enhanced through improved joint working between Jobcentre and Service staff. Customers valued the opportunity to see a Careers Adviser in the Jobcentre because it was convenient and cut down on travel costs. However, customers valued most the input they received from the National Careers Service and were able to demonstrate a range of positive outcomes.

There was anecdotal evidence to suggest that co-location, combined with a proactive approach, might impact positively on FTA rates. This is a key factor for Prime Contractors in the context of Service delivery that is output-funded. However, the qualitative nature of the study, and a lack of robust management information, means that further evidence would be required to make a fully-informed assessment of the impact of the Trails on Failure-to-Attend as well as off-flow rates.

Finally, a key aim of the Trials was to support and encourage customers to make best use of the different aspects of the National Careers Service on offer. However, in most Trial areas, the level of awareness of telephone and web-based channels amongst Jobcentre Plus staff and their customers was relatively low. This is particularly significant in the context of DWP's aim to ensure customers are signposted and referred effectively. Raising awareness and understanding amongst Jobcentre-based staff of the services available through the National Careers Service is crucial and continues to present a significant challenge.

5 Developing Co-location

In this final section, we set out key research findings on innovative approaches that add the greatest value. We also offer conclusions and recommendations to inform the work moving forward.

Key Research Findings

Prior to the Deepening Co-location Trials, the Next Step face-to-face channel was located in over four out of five Jobcentres, typically for two to three days per week. Our analysis of the Joint Implementation Plans and checklist data for the eight Trial areas that participated in the evaluation confirmed that, although co-location arrangements with Next Step were well-established, they were largely ad hoc and in need of significant development. Evaluations of previous initiatives involving joint working between Jobcentre Plus and Next Step highlighted a range of operational issues that must be overcome if joint working is to be fully effective.

Starting in September 2011, 22 trial Jobcentres were selected to build upon and develop existing arrangements in order to offer a more aligned service. Five requirements were developed as a minimum set of standards for the Deepening Co-location Trials. These have broadly been met in all the sites visited and have contributed to the development of deepened working relationships. However, the approaches adopted in the different Trial areas vary considerably due to factors including: custom and practice; local needs and priorities; perceptions of how best to build on previous joint-working arrangements; office space and layout; and workflows.

The Agency's guidance encouraged selected Trial areas to be innovative in their proposals. However, there was an underlying tension between the desire to be 'innovative' and the drive to be operational as soon as possible. This proved a challenge, particularly where changes to infrastructure were required in host Jobcentres (e.g. the installation of TV screens to publicise services, the erection of posters and sail banners and the creation of new interview facilities). The research indicates that the work involved in planning, risk assessing and implementing these changes was often under-estimated. Subsequent delays could have been reduced if DWP's estates and facilities manager (Telereal Trillium) had been engaged earlier to assist with the planning. Furthermore, delays could have been reduced or avoided if materials and resources had been approved under Jobcentre Plus Environment Guide (JPEG)¹⁰ guidance initially rather than after attempts to source them locally. Where difficulties occurred, the tenacity and determination of partners to develop creative solutions in order to overcome the challenges and make co-location a reality was striking. However, the delays in delivery inevitably reduced the time available to pilot agreed approaches.

Staff reported that the Trials had a positive impact on their awareness and understanding of respective organisational roles and remits. In areas where practice was well-developed, Advisers reported an improved understanding of the targets and constraints within which

¹⁰ See: <http://www.dwp.gov.uk/jpeg/about-jpeg/>

counterparts operate as well as a greater appreciation of the ways in which their respective roles and skills can complement and aid one another as well as customers.

One of the key aims of the Trials was to enable customers to make best use of appropriate aspects of the Next Step offer. This is particularly important in the context of DWP's aim to ensure that all claimants are aware of the National Careers Service and are signposted and referred effectively. At a time of economic restraint, there are few available resources to publicise the Service, and so the quality of referrals is vital, not just to generate take-up, but also to ensure customers are fully aware of how the Service can assist them. The implication of this - as with many of the findings - is that raising the awareness and understanding of Jobcentre Advisers regarding the role of, and services available through, the National Careers Service is crucial and presents a significant challenge. Overall, the lack of awareness of other channels and a lack of consistency in 'signposting' and 'referral' arrangements in the Trial areas means that it is far from clear whether customers are always accessing the most appropriate services. Although some systems and processes have improved as a result of co-location, the evidence clearly demonstrates that the duplication of effort that results from the lack of a common IT system and other key processes remains a principal barrier to effective and efficient joint working.

The Trial areas visited had considerable experience of joint-working prior to the Trials. As co-location rolls out to Jobcentres with varying levels of experience of co-location, there will be considerable scope to build on existing practice in order to develop more consistent and effective arrangements.

Innovation and added value

The Trials involved a range of innovative approaches, particularly in relation to the development of discrete branded areas and private interview pods and engaging Information Advisers. There is also evidence of innovation in service delivery, including the provision of direct customer access to the telephone and web-channels alongside increased access to face-to-face services.

Pods and Branded Discrete Areas

It is clear from this and previous research that having a distinct area in Jobcentres helps to raise the profile and visibility of National Careers Service provision. Specially-developed interview pods offer one solution to the challenge of creating a discretely branded area which also affords Advisers and customers a degree of privacy and confidentiality. However, the design and position of these structures need careful consideration to prevent them from becoming a 'barrier to closer working' between the co-located partners. Flexibility is key and it is important for sites to be allowed to devise an appropriate approach that best fits their location and circumstances.

The pods undoubtedly bring added value, both in terms of increased awareness of the Service and an enhanced customer experience. However, pods are costly to install and it is difficult to attribute a value in monetary terms to the contribution they bring. It is, therefore, far from certain that a widespread roll out of this approach would be feasible and the best use of available resources.

Information Advisers

The evidence suggests that the Information Adviser has fulfilled a crucial role in relation to a number of aspects of co-location. The role is particularly effective and adds most value when the post-holder has a background in guidance and is fully engaged in working with both customers and the wider Jobcentre and Service team. If the appointment of Information Advisers is to be taken forward, further clarification regarding the role and remit in different contexts would be required in the form of a person specification. Key considerations would be to ensure that:

- the role complements the work of Careers Advisers who are operating with the National Careers Service funding model;
- the tasks undertaken include liaison, training and development work with Jobcentre and other staff (potentially including employers and other bodies) to help them to develop a better understanding of the National Careers Service offer; and
- they support customers through 'enhanced signposting' arrangements, including ensuring that those in need of in-depth careers advice are helped to access it, and those who are able to 'self-help' are directed to the appropriate tools and resources
- they develop effective mechanisms to boost attendance, follow-up customers to ensure they take forward their action plans, and record impacts and outcomes.

It should be noted that the introduction of the role of Information Adviser is relatively recent and is being explored through the Community Walk-In Pathfinders as well as the Trials. As a consequence, a possible way forward would be to enable the appointment of an agreed number of Information Advisers in Prime Contractor areas and, against clear criteria, to task them with providing a clear case as to where they feel they could add most value, including contributing to operational targets and policy priorities.

Enhanced Service Delivery

Building on the minimum requirements, enhanced approaches to planning and service delivery are being implemented in the best examples observed during the summative evaluation of the Trials. Key elements include:

- strategic planning between the Prime Contractor and the Jobcentre manager/lead to clarify the respective roles and remits of the organisations and to develop a joined up approach to meeting customer needs in the context of wider targets and policy requirements;
- ensuring that Jobcentre colleagues are regularly updated about all aspects of the Service's face-to-face, telephone and web offer;
- improving the 'customer journey' through assessing needs, using web-based tools, delivering both face-to-face and group interventions, and following customers up as appropriate;

- locating public-access PCs, 'warm phones', resources and Information/Careers Advisers in a visible and publicly-accessible area so that services can be made available to casual callers as well as Jobcentre Plus customers; and
- developing a pro-active approach that takes account of the distinctive contribution the National Careers Service can make to the delivery of services for different groups (e.g. 18–24s, 25+, lone parents, recently redundant) working in co-operation with Jobcentre staff.

Although enhanced working involves some investment (particularly in respect to funding the role of Information Advisers and public-access PCs), the main success criteria is a willingness on the ground to work together and make an integrated approach a reality.

Conclusions

The evaluation focused on the operation of the Trials after they had formally finished and the launch of the National Careers Service. It sought to identify through qualitative research stakeholders' perceptions of the impact of the Trials, and key lessons learned, as well as to draw out key issues that need to be considered in the context of a wider roll out.

Co-location in Jobcentres enabled Next Step to provide access to services for key priority groups. Sharing facilities is not only cost-effective in the longer term but also has the potential to enhance the offer for Jobcentre customers. The majority of customers interviewed welcomed the opportunity to access the National Careers Service in the Jobcentre and found the advice and guidance services received helpful. However, although good practice was identified and should be built on, overall, working arrangements were sub-optimal and further development is required if the potential of co-locating staff is to be fully realised.

One of the key aims of the National Careers Service is to deliver a 'universal' service alongside a service to priority groups through its three channels. Some 70 per cent of referrals to the face-to-face channel are currently coming from through Jobcentre Plus and this is likely to increase as co-location is extended.

Policy decisions need to be taken to determine what level of face-to-face service will be available to non-claimant groups and those voluntarily accessing services within and/or outside of Jobcentres. In the context of available resources, consideration should also be given to how professional, impartial advice through the National Careers Service is to be made available in a wide range of locations to extend the known benefits to the widest range of customers.

Recommendations

In light of these findings, CFE would like to make the following recommendations:

Department for Business Innovation and Skills

- Jointly consider the research findings with DWP and other national partners and disseminate this report, or an agreed summary, to help inform developing practice.
- In consultation with bodies including the National Careers Council¹¹, consider the future strategic direction of the National Careers Service, including the balance of work that is to be undertaken in and through co-location in Jobcentres.
- Agree in discussion with Department for Work and Pensions and other parties how co-location can best be developed, including what resources, new systems and new arrangements might be necessary to work towards the enhanced working practices evidenced through the Trials.
- Consider the case for providing additional resources to enable an agreed number of Information Advisers in Prime Contractor areas to be appointed and to task them with putting forward proposals to demonstrate where they could add the most value. If funding is secured, ensure that appropriate performance measures are put in place along with an evaluation framework capable of monitoring and assessing the extent to which outputs, outcomes and key success criteria are being met.

Skills Funding Agency

- Disseminate the report, or an agreed summary, to Prime Contractors and seek their views on the findings. In light of policy priorities and the available resources, agree a way forward in respect to the roll-out of co-location arrangements.
- Review the current guidance that is available to Prime and Sub-Contractors in respect to the delivery of co-located services and ensure that this aligns with and complements that issued by DWP to Jobcentre staff.
- Within available resources, develop with DWP ways of providing training to help Jobcentre staff better understand the extent and nature of the Service provision (e.g. both tools and interventions) and the benefits to them and their customers of using these services.
- Deploy Information Advisers in agreed locations if further appointments are possible beyond March 2013;

¹¹ See: <http://www.bis.gov.uk/policies/further-education-skills/national-careers-council>

Department for Work and Pensions

- Disseminate the report, or an agreed summary, to relevant staff within Jobcentre Plus to help inform developing policy and practice.
- Encourage and enable District Managers and relevant local Performance and Change Managers to consider the arrangements for 'referring' and 'signposting' claimants, and wider customer groups, to the National Careers Service, in order to help promote the use of telephone and web-based services and ensure the most appropriate use of co-located face-to-face services. This could involve the introduction of local National Careers Service champions in Jobcentre Districts who are regularly briefed about all aspects of Service developments and outcomes and who could assist in disseminating this information to relevant colleagues, including new staff through induction.
- Work with BIS and the Skills Funding Agency to raise the awareness and understanding of Jobcentre Advisers about the National Careers Service, including supporting both local and wider training events (e.g. in connection with the Service's telephone and web-channel providers) and disseminating agreed training resources (e.g. podcasts) through the Knowledge Hub and other appropriate mechanisms.

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Appendix 1: Stakeholder Participants

Name	Organisation
Verity Bullough	Skills Funding Agency
Chris Guest	Department for Work and Pensions
Malcolm Haran	Department for Work and Pensions
Janet Healey	Department for Work and Pensions
Adam Micklethwaite	Department for Business Innovation and Skills
Melanie Miller	Department for Work and Pensions

Appendix 2: Deepened Co-location Checklist

Introduction

CFE has been commissioned by Department for Business Innovation and Skills (BIS) to review the operation of the Deepening Co-location Trials in the context of a wider evaluation of National Careers Service Partnership delivery.

The aim of this pro-forma/checklist is to provide us with some background information about the Jobcentre within which the Trials are being conducted and to help support a comparative analysis of how different sites are meeting the co-location standards. Please complete where indicated:

1. About the Jobcentre:

Name of the Jobcentre taking part in the Trial:

How many full-time equivalent staff are employed by the Jobcentre involved

in the co-location Trial:

Which of the following best described the area in which the Jobcentre is located? (Please tick)

Metropolitan/City

Town / Urban area

Rural

Other, please specify:

What is the rate of unemployment in the area served by the Jobcentre

involved in the Trial?

How many claimants will the Jobcentre serve in a typical week?

Has the Jobcentre previously been involved in either of the following initiatives? (Please tick if yes)

IES Trials

Skills Coaching pilots

Was Next Step co-located in this Jobcentre before the Trial? (Please tick)

Yes

No

Don't Know

IF YES:

a) How long has this arrangement been in place?

b) When was the co-located Next Step service available before the Trial? (Days of week and opening hours)

c) When was the co-located Next Step/National Careers Service available during the Trial? (Days of week and opening hours)

2. Co-Location Trial Checklist

Please tick and then comment briefly on the following:

	Yes	No	Comments
National Careers Service posters/publicity in Jobcentre Plus external windows			
National Careers Service posters/publicity displayed inside building			
Signage to National Careers Service services inside building			
Discretely branded National Careers Service area within building			
Interview POD/s, or other private interview space within discretely			

	Yes	No	Comments
branded area			
Full-time presence of National Careers Service Advisers (delivering IAG) in JCP office			
Full-time presence of National Careers Service Information Advisers (delivering information/signposting) in JCP office			
Customers have access to warm phones from which they can ring National Careers Service Helpline (0800 100 900)			
Customers have access to PCs/terminals from which they can access National Careers Service website			
Customers are able to make appointments at Jobcentre via National Careers Service helpline			
Customers have access to careers resources (in hard copy)			
National Careers Service staff are able to access broadband via JCP network			
National Careers Service staff have agreed to access broadband via wireless broadband mobile dongles			
National Careers Service have access to JCP intranet, including Knowledge Hub			
National Careers Service are able to access JCP customer records			
Mechanisms in place to support joint working between JCP Advisers and National Careers Service staff (e.g.			

	Yes	No	Comments
staff meetings)			
Other areas you would like to comment on in respect to joint-working with National Careers Service through the Co-location Trial:			

Are there any other brief comments you would like to make?

.....

Thank-you very much for completing this pro-forma/checklist. We look forward to discussing responses during the field visit. Please note all information provided will be fully anonymised and Jobcentres visited designated by letter only (i.e. not name, District or other location)

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