What Makes Work Search Reviews Effective?

A synthesis report.

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Dr Greta Todorova, Beth Pitcher, Faye Clitheroe, Dr Ben Whisker, Richenda Solon

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Executive summary

Work search review meetings (WSRs) are mandatory meetings between work coaches and claimants as part of the conditionality requirements for receiving Universal Credit (UC). There is comprehensive prior evidence that weekly meetings between work coaches and claimants reduce the time spent on benefit. However, this evidence predates the modern UC regime and we do not know the reasons why the weekly meetings are effective. The research presented in this report aims at identifying the important features which should form part of WSR meetings in order for them to be considered effective across delivery channels and assessing the effectiveness of different delivery channels (face-to-face, telephone and video) for claimant sub-groups.

The development of the research questions and choice of methodology was supported by a literature review and a Theory of Change model. Five change mechanisms were identified that fitted under the capability and motivation components of a COM-B framework: capability (job search assistance and recognition of barriers and circumstances); and motivation (through challenge, support and encouragement, and routine).

We applied a triangulation approach utilising complementary research methodologies. These included: observations of WSR meetings (11); qualitative research involving in-depth interviews with 51 claimants and 20 work coaches; and case studies of face-to-face (17), video (6), and telephone WSRs (8). A case study consisted of an observation of a WSR meeting; an interview with the work coach; and two interviews with the claimant – after the observed WSR and a follow up interview a week later. The research was carried out between March 2021 – January 2023.

Claimants perceive meetings as effective if they get direct results – i.e., an interview or hearing about job opportunities; or a focus on discussing the claimant's current applications and any wider issues. Factors that appear to be affecting claimants' motivation are barriers in their life, stigma about claiming and rapport with the work coach. Claimants with greater self-motivation and better-defined career aspirations and claimants with more specialised skills, find WSRs to be less useful.

For work coaches, effective WSRs are underpinned by building rapport and trust, tailoring meetings to individual needs (i.e., meeting focus, time and channel), and understanding personal circumstances and skills so the right support is offered. To support an effective meeting, it was important for work coaches to have enough time to prepare and cover everything during the WSR and be able to remind claimants of their commitments.

Overall, an effective WSR meeting relies on good rapport and a tailored approach from the work coach, taking into account all of the claimant's barriers, skills, motivation and aspiration and providing support in a positive and encouraging manner, while also challenging the claimant's beliefs about what they can achieve. An individual claimant's skills, motivations and barriers will inevitably play a part in their perception of the WSR's effectiveness. Allowing sufficient time for work coaches to prepare and carry out the meetings, along with the autonomy to tailor the

frequency and channel of meetings, will mirror claimants' wishes and will encourage a positive rapport and an increased WSR effectiveness.

Contents

Acknowledgements

Author details

Faye Clitheroe

Senior Social Researcher, Labour Market Analysis Division, Department for Work and Pensions

Beth Pitcher

Senior Social Researcher, Labour Market Analysis Division, Department for Work and Pensions

Richenda Solon

Principle Social Researcher, Labour Market Analysis Division, Department for Work and Pensions

Dr Greta Todorova

Senior Social Researcher, Labour Market Analysis Division, Department for Work and Pensions

Dr Ben Whisker

Senior Social Researcher, Central Analysis and Science Strategy Division, Department for Work and Pensions

Glossary

Theory of Change	Theory of change (ToC) is a tool that allows us to challenge the thought process, consider assumptions and develop an in-depth understanding of how change occurs. It is a structured approach for design, evaluation and decision-making. Essentially, a ToC is a comprehensive description or illustration of how and why a desired change or policy is expected to happen; your logical theory of how a change will happen.
COM-B	COM-B is a model of behaviour, which proposes that change in behaviours occurs only when an individual has the capabilities (C), opportunities (O) and motivation (M) to act out that behaviour (B). • **capabilities** (physical [skills] and psychological [knowledge, skills, memory, attention & decision processes]) • **motivation** (reflective [social/professional role & identity, beliefs about capabilities, optimism, beliefs about consequences, intentions, goals] and automatic [social/professional role & identity, optimism, reinforcement, emotion]) • **opportunities** (social [social influences], physical [environmental Context and Resources]) (Cane and others, 2012; Michie and others, 2011)
Universal Credit conditionality categories	Every claimant is allocated to a Labour Market regime based on their individual circumstances, household information and where applicable, earnings. Labour Market regimes • Working enough • No Work-related Requirements • Work Focused Interview • Work Preparation • Light Touch • Intensive Work Search Conditionality groups • All Work-related Requirements • Work Preparation

- Work Focused Interview

- No Work-related Requirements

The conditionality group and allocated Labour Market regime explains the level of support the claimant can expect to receive and the framework of what is expected of them.

Administrative Earnings Threshold	The Administrative Earnings Threshold (AET) highlights those claimants who have no income, or whose income is below the AET, so they receive intensive support.
	This support aims to help claimants increase their earnings by taking on more or better paid work either now or in the future.
	The AET is set at both an individual and a household level based on gross earnings (earnings before any deductions)
	From 13th May 2024, the rates are - single: £892.00; couple: £1437.00.
Conditionality Earnings Threshold	The Conditionality Earnings Threshold (CET) is a flexible threshold and is calculated using the number of hours a claimant is expected to undertake work-related activities and the National Minimum Wage or National Living Wage rate that applies to them.
	A claimant could be required to spend anything from 0 up to 35 hours undertaking work-related activities.
	If a claimant has earnings above their individual CET, they will fall into the Working Enough regime.
Way to Work campaign	The Way to Work initiative focused on specific outcomes (more people into work) and looks to focus efforts on: • Increase of work coach interactions with customers. • Move more people into employment quicker (Any job, Better job, Career) by reducing form 12 to 4 weeks the period that claimants can restrict their availability to employment in their usual occupation, or the same level of pay as they were receiving before loss of employment. • Engage with more employers through more JCP initiatives and activities.

Abbreviations

AET	Administrative Earnings Threshold
CET	Conditionality Earnings Threshold
ESOL	English for Speakers of Other Languages
FTA	Failure to attend
IAP	Intensive Activity Programme
IWS	Intensive Work Search regime
JSA	Jobseekers Allowance
MCJ	Multi-Channel Journey
MIF	Minimum Income Floor
NAO	National Audit Office
PPE	Personal Protective Equipment
pre-WCA	Claimants with a health condition and a current fit note who have not been assessed by the Work Capability Assessment process
QCA	Qualitative Comparative Analysis
ToC	Theory of Change
UC	Universal Credit
WSRs	Work Search Review meetings

Summary

Work search review meetings (WSRs) are mandatory meetings between work coaches and claimants as part of the conditionality requirements for receiving Universal Credit (UC). There is comprehensive prior evidence that WSRs reduce the time spent on benefit but there is an evidence gap around the reasons why WSRs are effective and whether this holds true under the modern UC regime.

The goals of the research presented in this report included identifying the important features which should form part of WSR meetings across delivery channels and assessing the effectiveness of different delivery channels (face-to-face, telephone and video) for claimant sub-groups.

This synthesis report brings together findings from strands of research investigating what makes WSRs successful in a UC setting. The research was carried out between March 2021 and January 2023. Following a literature review of national and international evidence and a Theory of Change and COM-B model, the research included primary qualitative research involving:

- observations of WSR meetings,

- in-depth interviews with claimants,

- in-depth interviews with work coaches,

- and case studies of face-to-face, video, and telephone WSRs.

The Theory of Change, COM-B model and under-pinning literature review identified five change mechanisms through which WSRs could be seen as effective in supporting claimant job search behaviour. These were: job search assistance; recognition of barriers and circumstances; and motivation (through challenge, support and encouragement, and routine). Evidence from the strands of research was analysed to identify whether it could support the Theory of Change assumptions and change mechanisms.

Main findings

1. How do claimants define a successful or effective work search review meeting?
- Claimants perceived WSRs as effective when they were personalised to their needs and their circumstances were considered. WSRs were perceived to have helped where claimants felt they understood the work coach's goals and where these were aligned to their own goals.

- When the WSRs added to claimants' motivation or capability, claimants recognised positive effects on their job-search behaviour.

- Meetings were considered to be effective by claimants if they got direct results such as an interview arranged through a Job Fair or hearing about new job opportunities.

- Claimants who did not find the meetings useful viewed them mainly as a compliance measure or a check-in with unrealistic expectations.

- WSRs were also more likely to be seen as making a difference by claimants with lower pre-existing motivation and less well-defined career objectives. For those with greater self-motivation or better-defined career aspirations, WSRs were sometimes felt to be less useful.

2. How do work coaches define a "successful" or "effective" work search review meeting?

- The work coaches' role is wide ranging, but the different aspects can be grouped together in three categories: nurturing claimants, driving progress, and ensuring compliance. As part of nurturing, work coaches spend time getting to know their claimants, finding out about their background, skills, work or training preferences and building rapport. Work coaches found that claimants became more engaged when they realised work coaches could provide genuine help and support. Successful WSR meetings then, were those where work coaches were able to build rapport and trust to achieve effective collaboration and positive claimant engagement.

- In turn this allows the work coach to drive progress by making suggestions and giving advice that the claimant is willing to listen to and act on. The work coach is then able to ensure compliance through undertaking checks that the claimant is meeting their claimant commitment and take appropriate action.

- Work coaches felt that it was important to tailor their approach to coaching to the individual, by tailoring the focus of meetings, adjusting meeting start times or selecting a particular channel that suits the claimant. Having time for effective coaching was considered important, but a dominant theme was that 10-minute appointment times are too short. Work coaches would value greater autonomy over meeting length and frequency to suit claimant needs.

3. Which elements of a work search review meeting do claimants perceive as effective?

- The most frequently discussed topics across meetings were around work search, claimant and/or work coach actions, conditionality, rapport building and claimant wellbeing. Apart from rapport building between work coach and claimant, these topics form part of the main policy intentions.

- There are three main components that promote a positive and effective meeting experience for the claimant and work coach. These are the job-search assistance that the claimant is receiving, the relationship between the claimant and the work coach, and a positive claimant engagement. These three components influence each other to create an effective meeting for both parties.

- Two of these components, the relationship between the claimant and work coach and positive engagement, were influenced by whether the meetings were personalised and tailored to the claimant, whether work coach and claimant work goals were aligned, whether the claimant received additional or wider support if required, and work coach occupational knowledge.

4. How do claimants experience work search review meetings delivered through different channels?

- Claimants tended to have similar attitudes to WSR meetings regardless of delivery.

- Claimant preferences were mixed, and some recommended a hybrid channel approach. Some claimants preferred telephone because it saved on travel costs or time. Others liked face-to-face because they felt it allowed them to better explain their circumstances and it involved getting out and meeting people. Flexibility in channel choice could bring about better experiences for claimants.

- Work coaches had a preference for face-to-face meetings. If work coaches had experience of video, their preference was either face-to-face or video, viewing video as a digital equivalent to face-to-face. Video was viewed as having some advantages over the telephone but there were concerns over misuse and the digital capability of claimants.

5. Do different claimant groups (18-24, 25+) have different experiences / expectations of work search review meetings?

- Claimants 18-24 and 25+ had similar experiences. However, the research is qualitative in nature and included a smaller number of claimants aged 18-24 than 25+ so this finding should be treated with caution.

- Claimants who had more specialised skills often found that there was not much support that they could receive from the Jobcentre.

Theory of Change

Overall, the research findings support the five change mechanisms through which WSRs effectively support claimant job search behaviour, as set out in the Theory of Change and COM-B model. The research also identified potential barriers to effective work search review meetings within these five change mechanisms.

Job search assistance:

- Work coaches discussed claimants' skills and capabilities to ensure appropriate job search direction and to help claimants broaden their job search. They also asked claimants about their work history, qualifications and location to tailor advice. Work coaches offered a range of practical support, e.g., job search advice, interview preparation provision, websites.

- Barriers: A lack of time for preparation or lack of diary space and targets could lead to unproductive WSRs or limit their effectiveness. Lack of occupational knowledge among work coaches could limit the usefulness of support the claimant received. Claimants who had more specialised skills and were self-sufficient did not perceive the help they received as useful.

Recognising barriers and circumstances

- Work coaches often first took an approach of aiming to understand a claimant's skills, aspirations and personal circumstances. Claimants valued

13

this and it contributed to their positive perceptions of meetings. When these were ignored the effectiveness of WSRs was undermined.

- Work coaches also identified barriers and supported claimants in overcoming them. Some barriers were straightforward to resolve, others were more complex or ongoing. Support from work coaches included UC, wider benefits and financial support to remove barriers to effective work search among claimants.

- Barrier: 10-minute meetings may prevent work coaches identifying and addressing claimant barriers.

Motivation – Giving support and encouragement

- Building a positive rapport with claimants was an important strategy used by work coaches. This supported positive interactions and perceptions of the WSR, better outcomes and better aligned support.

- Claimants valued emotional support from their work coach such as boosting confidence, reassurance and motivation.

- Work coaches and claimants sharing the same goals for the claimant was also important in building rapport with claimants.

- Barrier: 10-minute WSRs were sometimes seen as limiting the preparation work coaches are able to do and limiting the support they could offer to claimants in the meeting.

Motivation – Providing routine

- Some claimants thought WSRs helped them stay consistent in their work search, others found the routine of WSRs helpful for staying motivated.

- Work coaches used routine as a strategy to support some claimants who they felt would benefit from a sense of purpose during unemployment.

- Some claimants thought telephone WSRs would be helpful for keeping a routine, but others thought they would be disruptive.

- Barriers: lack of discretion over frequency and timing of meetings could limit the support work coaches could provide to claimants.

Motivation – Challenge

- Work coaches suggested to some claimants that they should broaden their work search. Some claimants valued this challenge.

- Claimants differed in how motivated they were by conditionality and sanctions. Some claimants viewed their WSRs as mostly a compliance/conditionality measure.

- Work coaches felt the risk of being sanctioned was encouraging some claimants to engage, although they felt it could cause others anxiety.

- Barriers: Work coaches not feeling comfortable with or lacking training on sanctions, and a lack of occupational knowledge among some work coaches, could limit their capacity to challenge claimants.

<u>Opportunity</u>

Opportunity, as defined by the COM-B model, is split into social and physical. For example, the social context can affect how claimants approach job search as well as how successful they are. Physical opportunity relates to local labour market conditions which will influence employment outcomes. WSRs cannot directly address Opportunity but they can mitigate some effects – for example, the effects of digital exclusion can be mitigated by providing access to internet, computers, mobile phones, or providing information about broadband for low-income individuals.

What Makes Work Search Reviews Effective?

A WSR meeting is experienced simultaneously by the claimant and the work coach, and its success is defined by the quality of the interaction between the two and the alignment of the two parties' goals, engagement from the claimant, and praise and encouragement from the work coach.

Claimants perceive meetings as effective if they get direct results – i.e., an interview or hearing about new job opportunities; or a focus on discussing the claimant's current job applications and any wider issues, health or barriers. Factors that appear to be affecting claimants' motivation are barriers in their life, stigma about claiming and the rapport with the work coach. Claimants with greater self-motivation and better-defined career aspirations and claimants with more specialised skills, find WSRs to be less useful.

For work coaches, effective WSRs are underpinned by building rapport and trust, tailoring meetings to individual needs (i.e., meeting focus, time, day and channel), and understanding personal circumstances and skills so the right support is offered. To support an effective WSR meeting, for work coaches it was important to have enough time to prepare for and cover everything during the WSR and be able to use the WSR as an opportunity to remind claimants of their claimant commitment.

Job search assistance and support for claimants goes hand-in-hand with challenging claimants' perceptions about what work they can do and what they can achieve. The success of both is underpinned by a positive claimant-work coach relationship and the investment of the work coach in the claimants' skills and aspirations. When these underpinnings are not present, then the support and challenge are not positively perceived by the claimant.

Overall, an effective WSR meeting relies on good rapport and a tailored approach from the work coach, taking into account all of the claimant's barriers, skills, motivation and aspiration and providing support in a positive and encouraging manner, while also challenging the claimant's beliefs about what they can achieve. An individual claimant's skills, motivations and barriers will inevitably play a part in their perception of the WSR's effectiveness. Allowing sufficient time for work coaches to prepare and carry out the meetings, along with the autonomy to tailor the

frequency and channel of meetings, will mirror claimants' wishes and will promote a positive rapport and an increased WSR effectiveness.

1. Introduction

The Intensive Work Search Regime and Work Search Reviews

The Intensive Work Search regime (IWS) is one of several conditionality groups that claimants can fall under when they apply for Universal Credit (UC).

Individuals are put in the IWS labour market regime if they are not working or working but earning low amounts (below the Administrative Earnings Threshold (AET)) and they are expected to take intensive action to secure work or more work. This includes claimants with the following characteristics:

- A single claimant not working.

- A single claimant with earnings below the individual AET.

- Lead carers, whose youngest child is aged 3 or older (these could be coming from Work Preparation regime).

- Claimants with a health condition and a current fit note who have not been assessed by the Work Capability Assessment process (pre-WCA).

- Gainfully self-employed and in the Start-up period (Minimum Income Floor (MIF) does not apply).

- A claimant with earnings below the individual AET and in a household with earnings below the couple AET.

- A non-working claimant in a household with earnings below the couple AET.

- Found fit for work following a WCA decision, for example, not being treated as having Limited Capability for Work but is awaiting a reconsideration or appealing the decision outcome.

At the time of writing, the IWS regime is comprised of the following components:

- Face-to-Face First Commitment Meeting covering 4 core elements:
    - establishing capabilities and circumstances; identifying work the claimant should look for; establishing work search, preparation and availability requirements; and establishing contact requirements.

- Conditionality – All Work-Related Requirements can be applied:
    - Participation in work search reviews for assessing prospects of remaining or finding work, coaching claimants, identifying training and educational options.
    - Work preparation activities (attending skills assessment, participation in employment programs, researching childcare, improving personal provision).

- o Work search activities (carrying out work searches, making job applications, creating/ maintain job profiles, obtaining references).
- o Requiring the claimant to be available to work and willing to immediately take up paid work/more work/better paid work.

- Conditionality Earnings Threshold (CET) – earning above this threshold will not require further work-related activity i.e., being moved to Working Enough regime.

- Administrative Earnings Threshold – only claimants below the AET will receive intensive support. Earning above the AET but below the CET would move an individual into the Light Touch Regime.

Work Search Review meetings (WSRs) are mandatory meetings between work coaches and claimants in the IWS regime as part of the conditionality requirements for receiving UC. For the first 13 weeks of their claim, claimants are expected to attend weekly WSR meetings. After 13 weeks, at the work coach's discretion, 50% of claimants are required to continue to attend weekly meetings; 50% to attend WSR meetings every fortnight. There are circumstances where these requirements can be suspended for a limited period of time, depending on the claimants' circumstances.

Project background

An initial scoping evidence review was carried out to define the project. It identified that while there is comprehensive evidence that face-to-face WSRs reduce the time spent on benefit (DWP, 2018a; Middlemas, 2006), there is a clear evidence gap around why WSRs are effective, or which groups they are most effective for. Most of the findings are also based on research into Jobseekers Allowance (JSA) and there has not been any research into whether they hold true under the modern UC regime.

Work coach resource, skill, and discretion
The importance of personal interactions was recognised in a 2006 report by the National Audit Office (NAO): personal advisers raised the confidence of claimants and supported them to improve their job seeking skills. Weekly WSRs were found to be more effective than fortnightly ones - in terms of reducing time spent on benefit and increasing days spent in employment. This support is particularly effective in the first 13 weeks of a claim (DWP, 2018a; Middlemas, 2006).

In terms of communication between advisers and claimants, a large DWP study identified techniques and styles that were more effective in moving claimants closer to work. Advisers were demonstrably more effective when they were more collaborative, directive, proactive, positive, and challenging (Drew et al., 2010).

Varying the amount of time that claimants spent with advisers (where claimants had shorter fortnightly job search review meetings) had no effect on reducing time on benefits (Middlemas, 2006). More frequent meetings from work coaches for UC claimants in low-paid work or low-income households led to greater earnings progression (DWP, 2018b).

Use of different channel

At the time of the scoping review, there was limited evidence on the design of the intervention and delivery channels. There was also limited internal evidence on video meetings in relation to DWP services.

Varying the channel can affect how long claimants stay on benefit. For example, telephone signing resulted in a statistically significant increase in the time spent on benefit by 6.6 days (Middlemas, 2006). Other international evidence showed that changing face-to-face counselling to online and telephone counselling increased average unemployment by 2-3 weeks (Vehasalo, 2020).

A report on how claimant facing support organisations responded to the COVID-19 pandemic found that (Edmiston and others, 2021):

- Some thought remote working was a challenge for effective work with service users. It was harder to pick up on non-verbal cues, build trust, build rapport and assess needs.

- Remote delivery of employment support posed similar challenges in terms of consent, rapport and the quality of interactions. However, service providers did think that client engagement had improved with remote delivery.

- Some service providers thought remote support by online or telephone could allow a better connection with some claimant groups, decentralise locations where support is accessed and make meetings more inclusive.

- There was concern about those with complex needs 'slipping through the cracks' and struggling to access remote support. People with low digital literacy or those with digital access issues; people who lack confidence communicating by phone and people for whom English was a second language were identified as particularly vulnerable.

Video consultations give many of the visual cues of a face-to-face interview and may provide a good environment for discussing sensitive topics. However, technical issues can disrupt the visual cues (O'Connor and Madge, 2001; 2004). A separate study found that some demographic groups such as students preferred video consultations with GPs; however, older patients preferred face-to-face. This study also found that patients who use video calling in their everyday lives are significantly more likely to favour using it for consultations (Barsom and others, 2021). Some clinicians considered video consultations more personal and better for rapport with patients than a telephone call. Some patients found a video consultation less stressful than a physical trip to a GP office (Donaghy and others, 2019).

One study highlighted that claimants may find the filming process uncomfortable or lack the capability to engage in a video consultation (e.g., due to a poor connection, technical capability, or a lack of credit) (Hay-Gibson, 2009).

Aim of the project

The aim of this research is to identify the important features that make WSRs effective and to assess the effectiveness of different delivery channels for claimant subgroups.

The research questions are:

- How do claimants define a "successful" or "effective" work search review meeting?

- How do work coaches define a "successful" or "effective" work search review meeting?

- Which elements of a work search review meeting do claimants perceive as effective?

- How do claimants experience work search review meetings delivered through different channels?

- Do different claimant groups (18-24, 25+) have different experiences and expectations of work search review meetings?

2.   Theory of Change

Theory of Change (ToC) is a tool that allows us to challenge the thought process, consider assumptions and develop an in-depth understanding of how change occurs. A Theory of Change for WSRs can tell us how WSRs are **expected** to help claimants. It will also consider what assumptions we are making that can be addressed in future policy changes. A full ToC logic model was developed in 2020 by DWP and a follow-up workshop was carried out in September 2021. The first iteration of the logic model demonstrated how the activities that form part of the WSR combine into the relevant inputs that then form the components of the change mechanisms that influence the expected outcomes of the WSR meeting (job-search behaviour and other), and how those ultimately lead to the desired effect of the WSRs. Following the updated Theory of Change mechanisms from the 2021 workshop, the array of mechanisms were condensed into five change mechanisms (challenge; support and encouragement; routine and structure of WSRs; job-search assistance; and recognising circumstances and tailoring support and referrals).

To understand how the WSRs are expected to affect claimant's behaviour, we have taken a COM-B approach that frames the five change mechanisms. COM-B (Cane and others, 2012; Michie and others, 2011) is a model of behaviour, which proposes that change in behaviours occurs only when an individual has the capabilities (C), opportunities (O) and motivation (M) to act out that behaviour (B). COM-B focuses a lot on internal motivation. Thus, by using the COM-B model to describe the desired effects we want WSR meetings to have, we are inevitably discussing how to support

that internal motivation. Thus, the challenge mechanism mentioned in the previous paragraph, is not about deliberately causing discomfort to the claimant. Instead it is about supporting the claimant's internal motivation to perform the job-search and enter employment through encouraging negative motivation – i.e., avoidance of unpleasant circumstances/outcomes – or through challenging the claimants' pre-existing belief about the types of occupation they could work in and how widely their skills can be applied by suggesting other occupational fields.

Through a review of international and UK evidence, we identified the effects that the change mechanisms are expected to have on claimants, and the assumptions that need to hold to achieve a positive effect. By mapping the expected effects of each mechanism, the consequences of WSRs were identified for each component of the behavioural model.

It is important to note that, international studies reflect countries' distinct benefits systems and active labour market support programmes, meaning certain interventions and practices might not be as effective in a UK context. As evidence from the UK does not directly reflect the current UC system (see Project background), the current findings will also help frame the UK experiences in relation to international literature.

Evidence Background

As part of the project, two literature searches were requested from the DWP Research Library. These were searches on 'Effectiveness of Work Search Review Meetings', and 'Measurement of coaching effectiveness'. Additional literature came from the initial scoping review (see Project background) and through a snowballing technique and reference list reviews.

The way labour market interventions support positive employment outcomes is multi factorial. It has been shown that simple linear interactions, such as only focusing on increasing the intensity or frequency of job seekers' behaviours, do not solely lead to successful employment outcomes. Instead, job search interventions affect employment status through focusing on behaviours, improving individual factors such as job search self-regulation (i.e., goal exploration and clarity), job search self-efficacy and job search skills (Liu and others, 2014. van Hooft and others, 2021). This means that for an intervention to have a positive effect on individuals' employment success, either qualitative (quality of the type of job) or quantitative (gaining employment), it needs to focus on the antecedents to job-search behaviour – i.e., individuals' motivation.

The rest of this section will be structured around the Theory of Change and COM-B model's components – capability, motivation, and opportunity. It is noteworthy that most of the evidence is international and/or not from the UC context. International studies reflect countries' distinct benefits systems and active labour market support programmes, meaning certain interventions and practices might not be as effective in a UK context. The current project's main purpose is to fill this evidence gap by producing evidence on the design of the WSRs.

Capability

Job search assistance

Starting off with increasing capability, there are a few ways in which capability of an individual to engage in productive job-search behaviours can be improved. Firstly, an intervention can focus on assisting individuals with their job search. Job search interventions that include a focus on job search skills have been shown to lead to positive employment outcomes (Liu and others, 2014). The Intensive Activity Programme (IAP) trialled in the UK focused on job search skills such as CVs, application forms, interview skills, internet job search and work search area. It showed that the claimants who were receiving the intensive support were more likely to be off benefit by their fifth week and the effects were sustained over the first 9 months (DWP, 2016).

There are however additional contributing factors that can affect the extent to which job search support can be effective. Those case workers that had a longer experience in work shared their career history with the claimants, had a strong relationship with employers and were more likely to lead to better employment outcomes for the claimants that they were supporting (Behncke and others, 2007; Cederlof and others, 2021). Thus, the case worker's, or in relation to the UC system, the work coach's employment knowledge and experience could influence how successful that job search support is. For example, to be able to suggest employment in a broader work area, a work coach would need to have good occupational knowledge to take the claimant's transferable skills and find where they could fit. Indeed, the IAP trial identified as important support and training for work coaches so that they can provide better job search support.

Recognition of barriers and circumstances

Another way to increase an individual's capability is to understand what are the barriers that are preventing them from doing an adequate work search and finding employment. The ESA trials and external research suggest that for claimants with complex needs, sufficient time is needed to address those needs and for case workers to develop an understanding of the claimant circumstances (Moran, 2017; Quinio and Burgess, 2019). Specifically, for those claimants who are further from the labour market or are long-term unemployed, more individualised support would be beneficial (Eichhorst and others, 2015). Thus, proper addressing of claimant circumstances and approach tailoring can provide the psychological breathing space for claimants to engage in work search activities. In addition, knowledge around benefits would be needed for the work coach to assist in addressing potential financial and health concerns affecting the work search of a claimant.

During the Theory of Change workshop, it became clear that recognising the claimant's circumstances is not only about what barriers they are currently facing. It is also about finding out their interests and skills. In fact, better engagement with the claimant and discovering their personal interests to help them focus on their goals would be needed for a work coach to be able to provide the personalised job search assistance to positively affect employment outcomes (Drew and others, 2010; van Hooft and others, 2021).

Motivation

As mentioned in the [Theory of Change section](#), motivation is a big driver in claimant ability to increase the intensity and quality of their job search behaviours. The Theory of Change identified several ways in which the motivation of claimants can be affected as based on evidence. This section will go through each of these in turn.

Challenge

Challenge within this context does not necessarily mean that work coaches are deliberately causing claimants discomfort. Instead, work coaches can use different levers to engage claimants' motivation – i.e., through negative motivation such as using sanctions and conditionality to deter claimants from disengaging and challenging claimants' own beliefs about what they can achieve in terms of sector and work hours.

Literature on using sanctions as a deterrent show that caseworkers focusing on workfare (restrictive style) have better employment outcomes (Cederlöf and others, 2021). Several international studies show that sanctions can have a positive effect on raising employment rates (Abbring and others, 2005; Boockmann and others, 2014; van den Berg and others, 2022). A UK-based study investigating the effects of suspension of job-search monitoring in Northern Ireland found that it led to a significant reduction in job-entry amongst the male unemployed (McVicar, 2008; 2010). This suggesting that reforms strengthening job search monitoring can on their own reduce registered unemployment. However, whilst warnings about sanctions and issued sanctions can lead to increased job finding rates, stricter conditionality does not necessarily increase compliance and employment (Maibom Pedersen and others, 2012). Moreover, those sanctioned have been found to find less favourable employment in terms salary and job duration (Marinescu, 2017).

Moreover, different individuals may respond differently to such types of negative motivation. For example, differences across gender were found in a Danish trial where customers were instructed that after 13 weeks they will be included in an activation programme (training or education) (Maibom Pedersen and others, 2012). Women did not react to the threat of activation and accumulated less employment days. Men on the other hand, found employment ahead of the activation (ex-ante effect). Several studies from the UK show different effects for men and women as well. The former Restart Programme (1987) found reduced long-term effectiveness for women (Dolton and O'Neill, 2002). Additionally, a study on the Lone Parents Obligation reform found that work search conditionalities increased the flow of single parents into work, but also caused a large proportion of single mothers to move onto health-related benefits or into non-claimant unemployment (Avram and others, 2018).

Furthermore, loss of income might have a negative effect on mental health or financial situation affecting the work coach-claimant relationship (Quinio and Burgess, 2019). In turn, some caseworkers can become reluctant to implement strong sanctions due to fears that welfare recipients can no longer pay rent and may end up homeless (Gotz and others, 2010).

Challenging claimants' beliefs about what they can do and what they should aim for is another form of claimant engagement. It can be perceived as pushing customers in a certain direction that they might be less comfortable doing but equally capable of achieving. It has been suggested that exposure to a larger occupational breadth, especially for long-term unemployed who search narrowly (challenging their perceptions about suitable jobs) can lead to more interviews (Belot and others, 2019). Customers being coached by less 'co-operative' caseworkers, who felt that jobseekers should be pushed to consider job vacancies independent of their wishes, had about a 2 percentage points higher employment probability than those who were coached by less demanding caseworkers, who felt the wishes of the unemployed person should be satisfied (Behncke and others, 2010). This is also where the employment knowledge and employment network of the work coach would be an important factor, as discussed previously (Behncke and others, 2007).

Separate from what a work coach can do, stigma about being on benefits on its own can be a motivational factor pushing people into finding a job. In the UK, there is high stigma of claiming benefits (Baumber Geiger, 2015) and the stigma of unemployment can lead to high levels of job search (not job finding), however, stigmatised individuals are more likely to expect that their chances of re-employment are low (Krug and others, 2019).

Support and encouragement

The flip side to challenging claimants is engaging in increasing claimants' positive motivation – i.e., the motivation to strive towards rather than away from something. Job search self-regulation is one major process suggested to be positively associated with job search intensity, quality and employment success. It is a combination of "establishment and specification of job-search goals, planning of the job-search activities, and self-control of attention, thoughts, affect, and behaviour regarding job search" (van Hooft and others, 2021). Customer-focused engagement – i.e., allowing for tailored support through focusing on the customer's plan, goals and skills – can lead to larger engagement from the customer side (Drew and others, 2010). It has been shown that completing a detailed job search plan increases the number of job applications submitted and can help diversify individuals' search strategy (Abel and others, 2019).

Moreover, the positive relationship and career support can lead to improvements in job search self-efficacy and confidence leading to improvement in job-search quality and job search intensity (Grützmacher and Schermuly, 2021; van Hooft and others, 2021). Hence, the relationship between work coaches and claimants would be expected to be tightly weaved with the job search support that the work coach is providing.

Like negative motivation, the levels of positive motivation will vary between claimants. The individuals' characteristics and attitudes towards employment and job-search are expected to be strongly affect their motivation and on their behaviour. Various characteristics have been suggested by a recent meta-analysis (van Hooft and others, 2021). These can have positive and negative effects depending on the

direction (e.g., lower trait self-regulation would lead to lower job-search intensity and, in turn, lower employment success).

Routine

Finally, routine was a mentioned component in our Theory of Change workshops. Although routine is not part of policy intent, it had been suggested that the routine of attending meetings will motivate claimants to be more consistent in their job search. Research suggests a loss of an early meeting in an unemployed individual's journey led to 10 days longer unemployment (Schiprowski, 2020). Further, when JSA claimants were not required to sign on during the first 13 weeks, that led to a longer spell of unemployment (6.1 days) as well if they were not required to sign in the first 7 weeks (5.8 days increase in claim) (Middlemas, 2006). It is also possible that one of the reasons for the longer time on benefits in the JSA Intervention trials for telephone signing is due to the disruption of the claimant's routine, requiring them to wait for the work coach call. On the other hand, the lack of routine in unemployment could have adverse psychological consequences for individuals (Delaney and others, 2011). It is possible that the imposed regularity from WSRs, could act as a protective factor for unemployed individuals' psychological wellbeing, thus allowing them to better focus on job search.

Opportunity

Opportunity as part of the COM-B (Cane and others, 2012; Michie and others, 2011) framework is split into social (social influences) and physical (environmental context and resources). Social class and social norms can have a negative effect on individuals' perceptions of unemployment. For example, research with undergraduates searching for full-time employment in the USA has shown that those from lower social classes have lower job search self-efficacy, lower social support and higher perceived financial hardship. This in turn leads to lower job search intensity (DeOrtentiis and others, 2022). Thus, the social context of claimants could affect how they approach job search as well as how successful they are.

With respect to physical opportunity, the labour market conditions in the local geographical area and in the UK will have a specific effect on the employment outcome of individuals (Manroop and Richardson, 2016). Further, potential displacement effects due to other interventions in the area could reduce claimants' employment outcomes (Cheung and others 2019).

Whereas WSRs cannot directly address Opportunity, they can mitigate some digital exclusion by providing access to internet and computers in Jobcentres. It is important to acknowledge opportunity barriers as contributing factors to the customer's motivation and capabilities.

3.   Research Methodology

This section provides details about each of the research strands that were undertaken as part of this project.

Phase One

Observations (March 2021)

We observed eight work coaches from across the north of England. Areas included major cities, suburban areas and coastal towns. A total of 15 observations of different appointments were carried out. Eleven of those were of WSRs and the findings reported in the next chapter focus on these. From the 11 meetings, eight were with claimants 25+ and three with claimants 18-24 years old.

An observation template was designed to help the observer record the meeting content. The template captured topics that were covered in the meeting, such as checking work search, wellbeing, provision and whether these were initiated by the work coach or the claimant. The template also included two scales, by which the observer scored the claimant's engagement in the meeting and their ability to look forward (i.e., by demonstrating their ability to discuss future plans).

Observations took place in late March 2021. These were conducted when the COVID-19 pandemic was still heavily affecting the economic rebound, WSRs were carried out by telephone every two weeks, and conditionality was suspended.

Research with work coaches (July – August 2021)

Phase One included research with work coaches. Operational leads were asked to identify work coaches who would be willing to take part in an interview. Work coaches in scope of the research were those who undertook WSRs with UC claimants in the IWS regime.

Ten in-depth interviews were completed in Phase One with work coaches from eight different Jobcentres in England. These interviews took place between July and August 2021. All interviews were conducted using MS Teams. Interviews took between 60 and 75 minutes. Each interview had an interviewer and a note-taker.

A topic guide was developed for the interviews, which was not a fixed script but served as an aid to structure conversations (see Appendix A.1). The topic guide was developed by looking at evidence gaps related to the research questions, the emerging themes from a Theory of Change exercise, and stakeholder input.

Topics covered in the interviews included work coach background, WSR preparation, customer attitudes to WSRs, the duration, time and frequency of meetings, events after the WSR, channels of communication, and concluding remarks. One section focussed on the most recent WSR conducted by the work coach, whereby work coaches were asked detailed questions about their most recently held WSR. This was done so that work coaches could talk about a specific meeting that they would more easily be able to recall and provide richness of data around a range of recent meetings across work coaches. This was done to help generate balanced views of WSRs.

To analyse the data, a deductive coding framework based on the topic guide questions was developed. Interviews were coded using NVivo. Additional inductive codes were added into the coding framework as they were identified.

Research with claimants (September – October 2021)

Phase One also included 51 in-depth telephone interviews with IWS claimants. We aimed to maintain a balanced representation of claimant characteristics – 18–24-year-old vs 25+; 6-7 weeks since claim vs 8-13; male vs female; those whose recent meeting was held face-to-face vs telephone; and from the three nations of Great Britain. A random sample of IWS claimants who met these characteristics were sampled from DWP records. The interviews took place in September and October 2021.

Topic guides were developed based on evidence gaps related to the research questions, and the initial development of the Theory of Change (see Appendix A.2). Topics covered claimant background, channel preferences, a recent meeting using a channel prioritised based on rarity (telephone over face-to-face), views about WSRs in general, outcomes and relationships with work coaches.

Interviews lasted between 40 and 50 minutes. Each interview had an interviewer and a note taker. Claimants were offered a £20 LovetoShop e-voucher as incentive to participate in the research.

An analysis framework was created, based on themes identified in an initial review of the interview notes. Claimant experiences and perceptions were represented where relevant to the research questions. Interviews were coded using NVivo and a quality assurance exercise was carried out afterwards to assure consistency of coding between analysts.

The research took place following a return to weekly face-to-face WSR meetings in the first 13 weeks and the reinstatement of conditionality following easing of rules around the COVID-19 pandemic response.

Phase Two

Research with work coaches (December 2021)

As in the first phase, work coaches were selected by approaching operational leads and asking them to identify work coaches who would be willing to take part in an interview. Work coaches in scope of the research were those who completed WSRs with Universal Credit claimants in the Intensive Work Search regime.

Ten interviews were completed with work coaches from ten different Jobcentres in England. The interviews took place in December 2021. All interviews were conducted using MS Teams. Interviews took between 60 and 75 minutes. Each interview had an interviewer and a note-taker.

The iterative methodological approach meant that we could make changes to the topic guide based on analysis and reflection from Phase One, enabling us to explore additional questions in Phase Two (see Appendix A.3).

As in Phase One, analysis was completed using a deductive coding framework based upon the topic guide questions. Interviews were coded using NVivo. Additional inductive codes were added into the coding framework as they were identified.

Both phases of work coach interviews took place prior to the Way to Work campaign that took place during February – June 2022.

Case Studies (May – June 2022 and November 2022 – January 2023)
The methodology involved the development of case studies, centred on a WSR between a claimant and a work coach. Case studies are used to help illustrate certain points from the identified themes. A complete case study consisted of:

- An observation of a face-to-face, video or telephone WSR between a work coach and a claimant.

- Follow-up interview with the work coach discussing their decision process and experiences of the meeting.

- Interview with the claimant as soon as possible after their meeting discussing their experience and view of it (some flexibility around timing was allowed to fit around the claimant's schedule).

- Follow-up interview with the claimant about a week after their observed meeting, discussing the actions completed and activities undertaken since.

Case study observations
Sites were contacted to identify volunteer work coaches who would be happy for their WSR meetings with claimants to be observed. A claimant pen portrait, containing recruitment criteria, was then sent to work coaches to help identify suitable claimants for potential inclusion.

An observation template was adapted from the Phase One telephone observations; it was piloted and updated after further tests in the first fieldwork site.

At the beginning of the meeting, work coaches asked claimants if they agreed for their meeting to be observed and the researcher stayed to observe the meeting. For the video and telephone observations, work coaches asked claimants if they agreed for their meeting to be observed, notified us if they agreed and then we joined meetings (via telephone or joining the meeting by the appointment in the UC build). For these meetings the researcher joined after the meeting had started, meaning some early discussions might have been missed.

Claimant Pen Portrait (selection criteria)

We wanted to include claimants who met the following criteria:

- UC claimants in the Intensive Work Search regime
- <u>For video and telephone research only:</u> Claimants consistently using video/telephone as much as possible.
- Claimants booked in for a WSR interview and **not** a different appointment type (FCM, CR etc.)
    - There have been **up to 13 weeks** since the claimant's claim date.
    - <u>For video and telephone research only:</u> The claimant has attended **at least one** telephone/video WSR meeting since beginning of September.
- Claimants not on a health or self-employment journey.
- Claimants from a range of socio-demographic characteristics and circumstances such as:
    - Claimants who are parents
    - Claimants who are pre-WCA without an easement or fit note
    - Claimants who are 18-24 & claimants who are 25+.

<u>Case study interviews</u>

Based on preceding work coach and claimant research, two topic guides were developed for the case studies interviews: one for work coaches and one for claimants. For each of the work coach and the claimant topic guides, a set of questions was developed to be asked as far as possible of every participant, and a set of free space was provided for interviewers to develop tailored questions that were specific to the observed meeting (see Appendices A.4 and A.5).

- **Work coach topic guide:** This covered up to three (but occasionally more) observed WSRs that had taken place with the work coach during the observation stage. To be respectful of work coach time and because we could have observed more than one WSR per work coach, priority was given to WSRs where there was a successful (or a booked) first interview with the claimant. This maximised the chance of developing complete case studies. To minimise the chance of work coaches knowing which claimants took part in the follow-up interviews, we only covered information that was evident from the observations. Work coaches were not told which claimants agreed to participate in an interview. On a few occasions an interview covered more than three of their meetings as more of their claimants had agreed to take part in the research.

- **Claimant topic guide:** The claimant topic guide contained two parts: the first part covered questions asked immediately after the observed WSR and the second part covered follow-up questions asked about a week later. The follow-up questions focused on what the claimant had done since their meeting,

whether they had completed agreed actions, and whether there had been any changes that might have affected them since the first interview.

For the video and telephone research, where the fieldwork coincided with the evaluation of a separate feasibility study of a Multi-Channel Journey [1](MCJ) (video, telephone or face-to-face), topic guides were adapted slightly to gain insight on the MCJ journey, however all major areas that were covered in the face-to-face WSR research were also covered.

Claimant first interviews lasted up to 45 minutes and follow up interviews up to 15 minutes. Each interview had an interviewer and a note taker. Claimants were offered a £20 LovetoShop e-voucher after completing the second interview. Work coach interviews were either in person or over MS Teams and lasted between 60 and 75 min.

Face-to-Face case studies

The first round of case studies involved face to face WSRs. The fieldwork was conducted in May-June 2022, during an internal "Way to Work" campaign which had a strong focus of getting people into employment sooner, when meetings were face-to-face (F2F) and happening every week for the first 13 weeks.

Research took place in five Jobcentres across Scotland, Wales and England. Researchers attended Jobcentres and shadowed work coaches who had pre-identified meetings in their diaries that were consistent with a set of claimant characteristics (see above pen portrait).

In total, 31 observations, 22 completed first interviews with claimants, 17 completed claimant second interviews, and 12 work coach interviews were achieved. This amounted to 17 complete case studies. Claimants were a mix of 18-24 and 25+ year olds. Claimants' IWS claim length was a mix between the first 7 weeks and weeks 8-13 to reflect the pen portrait specification. However, there were a few 13+ who were included in the sample who were seen weekly (after the first 13 weeks, claimants could be seen weekly or fortnightly at the work coach's discretion).

We aimed to maintain a balanced representation of claimant characteristics. However, similarly to the Phase One claimant research, we saw a smaller number of 18–24-year-old participants.

Video and Telephone

The second round of case studies involved video and telephone WSRs. The interviews were conducted between November 2022 and January 2023. Research took place in four Jobcentres in England and Scotland.

In total, 14 observations (5 telephone), 8 (3 telephone) completed first interviews with claimants, 8 (3 telephone) completed second interviews, and 6 (2 telephone) work

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[1] The Multi-Channel Journey feasibility study fed into the development of the UC IWS WSR Blended Channels Trial

coach interviews were achieved. This amounted to 7 (3 telephone) complete case studies. (It was not possible to conduct one work coach interview where a claimant second interview had been completed).

The majority of claimants were 25+ year olds (one was aged 18-24, one did not specify). Claimants' IWS claim length was a mix between the first 7 weeks, weeks 8-13, and a few 13+ who were seen weekly.

The video and telephone fieldwork ran alongside a test of a Multi-Channel Journey in certain sites. The test had a strong focus of getting claimants into video appointments as a first point, then into telephone as an alternative, and finally face-to-face if the other options were not suitable.

Qualitative Comparative Analysis

Qualitative Comparative Analysis can be used to compare multiple cases and systematically understand patterns of characteristics associated with desired or undesired outcomes based on qualitative knowledge.

The complete case studies from the Phase Two case studies research (face-to-face and video/telephone case studies) were analysed using a QCA (Qualitative Comparative Analysis) inspired approach. As mentioned above, a complete case study consisted of an observation, two claimant interviews and a work coach interview. There were 17 complete face-to-face case studies and 7 complete video and telephone case studies.

For each case, the topics discussed in the WSR meeting (e.g., provision options or conditionality) and any relevant factors (e.g., work coach preparation time or rapport) were captured in an excel template. Each WSR meeting was classified as either "most effective", "somewhat effective" or "not effective".

WSRs were classified as effective if either:

- the claimant stated the WSR was helpful, or

- the WSR included action/s that moved the claimant closer to the labour market; for example, the claimant accessed provision, or the claimant received interview advice.

The data was examined for any common components amongst the WSRs deemed most effective or somewhat effective.

4.   Results and Discussion

The findings from the research described in the [Research Methodology](#) are presented in this section. In the next section, we also summarise how the findings contribute to the Theory of Change and COM-B model and highlight where they are consistent with existing literature.

Observations

In Phase One, substantially more time was devoted to rapport-building than any other theme, and while Work Coaches initiated this, some claimants engaged strongly with it. Challenge approaches were less common than support and encourage approaches. Routine was less common and usually implicit. Conditionality was raised by Work Coaches and was sometimes explicit. Fraud was only covered in meetings implicitly. Stigma was only raised in one meeting.

In the Phase Two face-to-face case study observations, the most often discussed topics across meetings were: work related, conditionality, rapport building and claimant wellbeing. Apart from the work coach-claimant rapport, these form part of the main policy intentions. For the video and telephone case study strand, the same topics tended to be covered, however instead of wellbeing, there were more discussions around additional support. It is possible that because researchers were not present at the beginning of the meetings, many of the wellbeing check-ins were missed. Similarly, work coaches considered the use of video and telephone as a good alternative for claimants who had additional needs – e.g., lived far away or had childcare responsibilities. Thus, they might represent a bigger section in our sample.

In Phase One observations, the most common discussions were on rapport-building, whereas in Phase Two, work related topics dominated the conversation. This is probably a reflection of the times when the two phases ran (Phase One observations took place after weekly WSRs had resumed and conditionality reinstated from September 2021; and in Phase Two, the research took place towards the end of the [Way to Work](#) campaign which ran from February – June 2022). Thus, it is reasonable to observe the shift in focus from rapport in Phase One to work related activities in Phase Two.

Work coach research

The main findings from both phases of staff research are outlined here.

Work coach role
The work coaches' role is wide ranging, but the different aspects can be grouped together in three categories: nurturing claimants, encourage progress, and ensuring compliance. As part of nurturing, work coaches spend time getting to know their claimants and build up a rapport so that they can provide the most appropriate advice and support. They might find out the claimant's background, skills, work or training preferences, and build up an understanding of what support the claimant may need in getting back to work. Through nurturing, the work coach builds rapport and develops trust which enables the claimant to feel listened to. In turn this allows the work coach to drive progress by making suggestions and giving advice that the claimant is willing to listen to and act on. The work coach is then able to ensure compliance through undertaking checks that the claimant is meeting their claimant commitment and take appropriate action.

Work coaches saw 'coaching' as part of their role. A crucial part to coaching effectively was listening to claimants and building a rapport. Work coaches spent

time getting to know their claimants so that they could personalise for the individual and provide the most appropriate advice and support. They might find out the claimant's background, skills, work or training preferences, and build up an understanding of what support the claimant may need in getting back to work. Work coaches discussed long- and short- term goals in WSR meetings with claimants. Positive and goal orientated conversation enabled the support and encouragement mechanism to function. Discussing a claimant's long-term goals also contributed to building rapport.

Building a positive bond with claimants is an important strategy used by work coaches. Claimants having a positive rapport with their work coach supports good job search intentions, good job search self-regulation, good job search self-efficacy and confidence, as well as supporting a focus on goals and plans. It also supports work coaches to identify any barriers to employment.

Work coaches identified other factors that affect their ability to coach; engagement and motivation level of the claimant, amount of work coach experience, familiarity of the local area and having time available.

Work Search Review meetings
Work coaches were asked about the role of the WSR. The two dominant themes were checking claimant commitments and supporting claimants to overcome barriers. Supporting claimants included work-related and non-work-related support.

Work coaches were asked detailed questions about the most recent WSR they had before the research interview. There were four topics which were consistently discussed; wider issues/health/barriers, current skills/skills needs/training, provision options and job search assistance. Typical topics were discussions on wellbeing; job search; provision; training; and the claimant commitment.

Wider issues/health/barriers included physical health, mental health and any personal circumstances that make securing work more difficult (for example addiction or homelessness). When this topic was discussed in a meeting, provision options were nearly always discussed too. By understanding claimants' personal circumstances and skill sets the right support could be offered to remove any barriers and increase employability with training and/or provision.

Work coaches were often taking an approach of first understanding a claimant's current position regarding skill set, personal circumstances, physical health, mental health and complex needs. Then they were able to tailor their efforts of support and provision referrals in order to move an individual closer to the labour market. Rapport underpinned work coaches' ability to do this.

Some work coaches thought WSR meetings had an effect on a claimant's search for work, whilst others did not. Some thought claimants were already doing all they needed to.

A common strategy the work coaches used was discussing skills and capabilities with claimants to direct to particular areas of work and refer them to appropriate provision and training. Where possible, work coaches prepared for meetings with claimants to

tailor the advice and direction they gave for work search activities. Work coaches thought preparation for meetings was important, but often struggled to fit it in.

Work coaches used routine as a strategy to support claimants with a sense of purpose during unemployment. For example, some work coaches set requirements in the claimant commitment with the aim of establishing a routine. The routine strategy was only used if work coaches felt it was needed and the approach was personalised for each claimant. Work coaches did not discuss routine if they thought a claimant was already proactive.

Frequency and duration of meetings

A 10-minute WSR meeting was viewed by work coaches as not long enough for a quality appointment and meant that important aspects of the meeting regularly had to be omitted. Too short meetings led to work coaches over running appointment times. Valuable meeting time was taken up by booking in the next appointment. Work coaches felt some claimants need longer meetings, for example those with complex needs and vulnerabilities, but they felt that 10 minutes does work for some groups of claimants who are confident in doing their job search.

Work coaches expressed a preference for discretion over the frequency and length of meetings to ensure they could have enough time to cover everything they needed to. When asked how they felt claimants viewed the frequency of WSRs, it was generally suggested that claimants think they occur too often, but that it depended on the customer. It was suggested that some claimants, particularly those who have a rapport with the work coach, find the meetings very useful and supportive, whereas others find them a chore.

Work coaches were asked what one thing they thought claimants would change. They thought claimants might want longer meetings, less frequent meetings and more time for work coaches to show them how to do things.

Work coaches were asked what one thing they would change about WSRs; the most common response was more time with claimants in the meetings. There was also a wish for more autonomy to choose the right meeting length for each claimant.

Conditionality and sanctions

Some work coaches felt that WSRs offer a good opportunity to remind claimants of their commitments, whilst others said they do not always have time during WSRs to discuss them.

Work coaches were unsure how well claimants understood the consequences of failing to undertake adequate work search, but this did not necessarily lead them to remind claimants in each meeting.

Work coaches felt that conditionality provided guidelines for claimants so that they can be aware of how their eligibility for UC is affected by their behaviour. Many work coaches felt it was the financial effects of imposing sanctions and suspending benefit payments that usually affected customer behaviour.

Work coaches felt that conditionality and sanctions were not always effective at driving behaviours, as there were some claimants who continued to fail to attend

appointments despite being sanctioned. Some work coaches were unenthusiastic about sanctions. They felt applying sanctions would cause claimants to experience financial difficulties, or they did not feel the need to regularly discuss sanctions with claimants who are engaging and meeting requirements. Work coaches tended only to apply them as a last resort. Work coaches not feeling comfortable to sanction is a barrier to the effectiveness of the Challenge change mechanism.

Work coaches generally felt that failure to attend (FTA) appointments was an issue amongst a proportion of their caseload. Some work coaches reported going through the sanctions process following FTA appointments, whilst others had not sanctioned their FTA claimants.

Channels
Face-to-face was generally the preferred channel for WSRs, especially for first commitment meetings, but telephone was seen being more appropriate in certain contexts.

Work coaches thought claimants may prefer telephone meetings.

The journal was not considered to be appropriate for a WSR but was the preferred contact method for between meetings.

A journal message could remind a claimant of the important discussion points from their WSR, ask how an interview went, and seek permission to make a referral to provision. This freed up time in the WSRs to discuss other things.

Personalisation
Work coaches spoke of meeting content being dependent on the individual claimant's needs. There was a consensus that it is important to tailor WSRs.

Work coaches talked about tailoring the focus of meetings to either progress or problem solving. Work coaches also tailored by adjusting the meeting start time or selecting a particular channel.

Some work coaches spoke about wanting more autonomy to tailor to each claimant's needs, as they wanted more flexibility on meeting length, meeting frequency and meeting channel.

Differences between customer groups
Work coaches felt those who were recently unemployed, had a history of self-employment or had a degree were likely to make quicker progression to employment. They felt that those with health barriers, personal barriers or with a history of multiple claims were considered likely to make slower progression to employment.

Claimant engagement
Work coaches thought claimants saw WSRs as a chore until they realised the potential benefits. Some work coaches in Phase Two linked an increased engagement level to claimants realising work coaches could provide genuine help/support.

Most claimants in the research were considered by work coaches to be forward looking and wanting to find work. When claimants were not able to look forward or not wanting to find work this was linked by work coaches to health or personal barriers.

Work coaches felt that some claimants felt stigma about claiming benefits whilst others did not, and work coaches felt there were no positive effects of stigma. A small number of work coaches stated that they thought stigma was demotivating for claimants and one work coach spoke of trying to change claimants' mindsets away from feeling stigma.

Claimant Findings

This section covers the Phase One claimant findings.

Channels and preferences for meetings
Claimants typically had received a combination of face-to-face and telephone meetings, with video appointments and digital WSRs being rare. Some claimants had a strong channel preference whereas others did not mind.

Claimants who expressed channel preferences generally regarded telephone as more convenient (as well as less expensive) and face-to-face as better for communication (e.g., in enabling non-verbal signs). Some claimants felt that, based on their own experiences of face-to-face meetings, content could be replicated via telephone meetings.

A subset of claimants who experienced face-to-face WSRs felt that this channel provided them with helpful opportunities for interaction and encouraged them to develop an improved job-search and/or daily routine.

Purpose of Work Search Review meetings
Claimant acceptance of WSRs related to their expectations of their own role and that of the work coach – meetings should be personalised and provide job support. Some meetings were only check-ins and claimants did not perceive these meetings as focused on meaningfully supporting their job search.

Claimant and work search goals
Claimant goals were beneficial whether centred on either final destinations or aims for specific meetings. No goals or limited goals reflected a lack of engagement with or acceptance of the purpose of WSRs. Perceptions of work coach goals were driven by whether claimants felt WSRs were personalised and alignment between claimant and work coach goals related to agreement on types of work sought.

Claimant and work coach relationship
The relationship between claimants and work coaches is the foundation on which support, engagement, and motivation rests. Familiarity with circumstances and work coach occupational knowledge contributed to effective relationships. Some claimants felt negative relationships reflected low work coach knowledge or a failure to consider their circumstances.

Work coach's positive attributes and understanding, combined with a tailored approach, underpinned the effectiveness of the interactions. Work coach attributes were a driving factor in claimants' positive experience with WSR meetings. Claimants were very appreciative of work coaches' friendliness, understanding, employment support and professional manner. Several times claimants also mentioned that the work coach drawing on their own experience was also helpful. However, support and understanding were also dependent on the work coach's ability to empathise with the claimant, which was easier if they shared similar characteristics and experiences.

Recent meetings

Claimants were asked questions about their recent observed meeting. Main findings were:

- **Job Search Assistance** - Recent WSR meetings were used to work towards improving the claimant's capabilities and challenging their motivation towards expanding their view on occupational opportunities. Active engagement of the work coach in the claimant's individual journey was a driving factor for positive perceptions of the received assistance.

- **Job Search Monitoring** - Monitoring can be a motivator but can affect the trust between work coaches and claimants.

- **Preparation -** Claimant preparation was centred around what they expected the work coach to ask or do.

- **Actions -** Effective actions set by the work coach for the claimant to do included those relating to unfamiliar opportunities and were underpinned by accountability. Claimants who felt the actions set to them by the work coach were ineffective tended to have higher self-efficacy.

- **Motivation and Routine -** The WSR meetings and their regularity helped to keep claimants active and motivated, but this was mostly true for claimants who were not already internally motivated.

- **Concerns** - Perceptions of low work coach effectiveness related to untailored referrals and only reactive support.

- **Conditionality and Sanctions -** Claimants had some awareness of conditionality and some expressed concerns about it in relation to WSRs. Some claimants were aware of sanctions and expressed mixed views about their motivational effect: some mentioned it had a motivational effect, others felt that the threat of sanctions did not influence them or had a negative effect.

- **Personal Circumstances and Barriers-** Claimants reported talking to work coaches about Universal Credit and other benefit support, discussing employment provision and training in their WSR meetings.

- **Channel Differences** - Claimants were likely to say that the channel had helped in their recent meeting but there was a minority who stated that channel did not make a difference. Claimants with no strong channel

preference overall sometimes had different views when discussing a specific meeting and the emphasis was on the channel's effect on interactions.

Comparing recent meeting and WSRs in general

Claimants' views of work coaches sometimes varied between the recent meeting and more generally. This could be due to a limitation of telephone meetings in facilitating interaction or continuity with the same work coach building familiarity.

Frequency and duration of meetings

Claimants reported a range of different meeting frequencies and durations. Regardless of meeting length, claimants generally felt the meeting lengths gave them enough time.

Some claimants felt that the frequency was "about right". Others felt that the frequency of their meetings was too much. In contrast, one claimant wanted to have more frequent meetings.

This suggests that work coach discretion in frequency and length of meetings allows for claimants to receive the right amount of support and monitoring. It is, however, possible that what a work coach considers the 'right' frequency and length for that claimant, might not be from the claimant's perspective as seen in the few claimants requiring different frequency.

Outcomes

- **Overall Perceptions -** Positive feedback related to relationships with work coaches, effective assistance and motivation gained. The work coach's engagement, including time committed to regular communication, was an explanation given for positive overall impressions. Claimants who liked WSRs overall tended to like their work coach. Improved motivation and routine, both in searching for work and more widely in approaching life, was a consequence of WSRs recognised and praised by some claimants. This was expected in the COM-B model, as the need to embed routines would depend on the claimants and an active work coach would provide more regular support where needed. Some claimants felt that examining job vacancies together with the work coach, at a face-to-face meeting, helped develop their job-search routine. Negative and ambivalent feedback was, for some, related to claimants' circumstances and expectations.

- **Where WSRs made a difference** - WSRs identified new job areas, maintained motivation to search and improved job-search organisation.

- **Where WSRs made a wider difference** - WSRs supported general wellbeing, provided benefits information and prompted in-person interactions.

- **Where WSRs did not make a difference** - Some claimants with high self-motivation and developed aims felt that WSR support was unsuitable.

- **Confidence and Motivation -** Assistance, support and monitoring can improve soft outcomes but can also be counterproductive depending on the claimant.

- **Capability and Job-Search Productivity** - WSR address self-efficacy and self-regulation in claimants but only for those with lower motivation or self-efficacy.

Conclusions from Phase One claimant research

The perceived success of WSRs and potential for positive change in job-search behaviours was greater for claimants whose prior motivation and capability was lower and could be improved through job-search assistance and monitoring.

Conversely, WSRs tended to be perceived as less effective by claimants whose pre-existing motivation and/or self-efficacy was already high, particularly where they felt that WSRs either inherently could not or did not help them in practice to achieve their desired career destinations.

The heightened stress from monitoring activities and threat of sanctions, was counterproductive for some, and productive for others and a balance needs to be struck between the two.

Claimants who preferred face-to-face meetings emphasised factors related to communication, interaction with the work coach and routine. Claimants who preferred telephone meetings emphasised convenience, travel, and cost.

Differences related to delivery channel and age group were not evident in most aspects of claimant perceptions of WSRs. Claimants with overall negative perceptions were generally over 25.

Case Studies

Face-to-face case studies

Work coach skills, style, and preparation

Work coaches generally felt that they used effective techniques when coaching. Some worried about training or capability to support older or unwell claimants. Work coaches often perceived that they lacked time to prepare and saw preparation as relevant to WSR success. They reported reviewing history notes, sometimes doing so in meetings rather than in advance.

They were typically positive about their job's focus on supporting and encouraging claimants to build motivation and find work. However, they often felt the required skillset (across different coaching and administrative tasks) was challenging. Some discussed asking claimants to visualise end goals and coaching to search for work, not just advising. They engaged claimants by pushing them to do more, listening to their perspectives and building-up job searches step by step. Others felt that their job was characterised by administrative tasks (e.g., verifying ID) and reviewing evidence without coaching, due to the brevity of appointments.

Channel preferences

Work coaches, more than claimants, showed a preference for face-to-face appointments. However, work coaches saw a need for discretion when choosing the correct channel for each claimant.

Claimants highlighted that communication was easier face-to-face but travel time and the length of meetings were drawbacks of attending face-to-face. These, however, were the benefits of using video or telephone delivery channels – ease and cost effectiveness. Whereas telephone was deemed more difficult for communication, video was perceived as similar to face-to-face. Claimants and work coaches thought that some meetings were not necessary to be held face-to-face and other channels were better suited. Some claimants viewed that having WSRs over the telephone would disrupt their own routine, while others viewed the possibility of phone WSRs as an opportunity to better fit with their life and save them time.

<u>Claimant motivation and goals</u>

Claimants' motivation and goal orientation varied. Barriers in claimants' lives, stigma about claiming and rapport with the work coach were factors affecting claimants' motivation. Work coaches reported variety of strategies to help boost a claimant's motivation – from emphasising the benefits of working to spending more time engaging with the claimant's interests.

Claimant goals focused on desired destinations. A small number of claimants had no or unclear goals. Many claimants felt that they shared the same goal of finding a job with their work coach.

<u>Job search assistance</u>

Work coaches engaged in claimants' background and skills to help them when providing job search advice. Those interested in specialised careers did not find the support useful. Work coaches often suggested to claimants to broaden their job search based on transferable skills they identified in the claimants. Many of the claimants were open to it. A minority of claimants were not interested in broadening their job search. This was for variety of reasons, including existing qualifications, childcare, or general aspirations for work with better work/pay conditions to match experience.

Work coaches offered different types of job search support to help claimants move forward:

- practical support with CVs and job search,
- soft skills support such as advice on skills,
- directing claimants' focus,
- signposting to training and job opportunities.

Rapport was a driving reason for positive perceptions of the job search support.

<u>Recognition of barriers and circumstances</u>

Claimants had a range of barriers that affected the type and amount of work they could do and the work search they could perform. WSRs often had a dual function – a focus on work search but also a focus on general support e.g., help with UC accounts, applying for advances or understanding benefit rules. Financial support to gain employment and in relation to budgeting was a part of meeting discussions. For example, claimants asked about advances of UC; budgeting loans, financial support to help them take up employment or pay for DBS checks or Personal Protective Equipment (PPE).

Understanding skills, aspirations and personal circumstances also allowed claimants to have a better perception of support. When those were ignored effectiveness of meetings was undermined.

Some claimants were engaged in meetings, but they were not forward focused to the same extent (according to our observations), highlighting that meeting immediate needs is a priority for some.

Job search monitoring and conditionality

Claimants were expecting some form of review of their work search. Work coaches challenged claimants' work search and hours they could do - which was appreciated by some, but not all. Work coaches used setting tasks for claimants to follow up on and references to the claimant commitment to keep claimants on track. Sanctions were used sparingly, and FTA leniency was observed as work coaches prioritised rapport with claimants. Some work coaches reflected that better explanations of sanctions or upskilling new work coaches in relation to conditionality or failure to attend would be helpful.

Work coaches felt claimants understood what was expected but sometimes needed reminding. Some claimants saw their meetings solely as a compliance measure. For some claimants, conditionality and potentially being sanctioned had a negative effect. Others felt meetings motivated them to make sure they undertook actions.

Claimant-work coach relationship

Rapport is an active process, built through the claimant's engagement and work coach's support and encouragement. There is an overlap between the ways claimants appraised their relationship and how the work coach tried to build it – being supportive, but also helpful with finding a job. Empathy and encouragement were important ways in which the work coach engaged with the claimant. This usually put the claimants at ease of sharing their (non) work related circumstances. Work coaches often highlighted that empathy and understanding was needed and they showed this in different ways – sharing own experiences, being more lenient in some cases, or acknowledging the claimant's situation.

Consistency of work coach was perceived to be important by many claimants, but not all. Work coaches were not appraising their relationships very differently but asserted that rapport usually takes time.

Frequency and duration of meetings

Claimants and work coaches highlighted that different circumstances would need different meeting lengths and frequency – i.e., those already motivated required less contact with their work coach and those with complex needs required longer meetings. Claimants saw short meetings more as a check-in than a space for support. Work coaches expressed a general appetite for discretion for frequency and duration. Many thought that the 10-minute appointments were not enough to cover everything they needed and wanted slightly longer such as 15 - 20 minutes to discuss issues, help with CVs, referrals and obtaining translators.

Outcomes

Reaching successful outcomes for claimants was a process that work coaches actively got involved in and claimants appreciated. Work coaches often made plans for the claimants' short- and long-term outcomes. Work coaches anticipated that claimants would behave differently in future meetings based on discussions and steps put in place in the observed meeting. However, they were ready to change their approach if this did not happen.

Several claimants had secured a job or were waiting to hear an outcome from an interview, but for some it was too early to tell about their progress. Some claimants reflected that work coach support or provision were instrumental for them getting a job or gained wider skills. Others were more equivocal.

Perceptions

- Of the observed meetings

  - Job search assistance, the work coach-claimant relationship, and claimant engagement were the building blocks for a positive WSR meeting experience from both the claimant and work coach perspectives. Claimant perceptions about the meetings usually stayed positive even a week later.

- Overall perceptions of work search review meetings

  - Claimants had both positive and negative views of their meetings, mostly linked to the support they received. Meetings were considered effective by claimants, if they got direct results or the work coach was interested in them. Meetings were considered ineffective, if they were the same each week, had a purely administrative focus or were check-ins only, or when the claimant thought they would have found a job anyway. Some raised concerns about the lack of privacy in Jobcentres or about the presence of screens as creating a barrier – of "them and us".

  - Both claimants and work coaches had suggestions about how to improve WSRs. Claimants focused on job search support and tailoring of scheduling. Work coaches focused on capabilities and support tailoring.

Conclusions from face-to-face case studies

41

- What makes Work Search Reviews effective?

Many claimants viewed that their successful outcomes were thanks to the support they received from their work coaches. This was true especially if they believed that they would not have obtained these opportunities on their own. However, those that did not find meetings useful, viewed the meetings as mainly a compliance measure or a check-in with unrealistic expectations.

Job search assistance and support for claimants went hand in hand with challenging claimants' perceptions about what work they can do and what they can achieve. The success of both was underpinned by a positive claimant-work coach relationship and the investment of the work coach in the claimants' skills and aspirations. When these underpinnings were not present, then the support and direct challenge were not positively perceived.

- What are the enablers and barriers surrounding claimants' successful outcomes and work coaches' effectiveness?

Barriers in claimants' lives, stigma about claiming, and rapport between claimant and work coach were considered factors affecting claimants' motivation. Most work coaches however reported a variety of strategies to help boost a claimant's motivation.

Overall, claimants wanted more tailored meeting frequency and channel use, and sometimes more detailed support. Work coaches expressed a desire for the autonomy to work differently with different claimant groups. Moreover, work coaches did not perceive 10-minute appointment times as sufficient to provide tailored support unless claimants are job ready. Limited time appears to be a recurring issue for work coaches, which impedes their ability to perform their work effectively.

Telephone and video case studies
<u>Work coach skills, style and preparation</u>

Work coaches saw their role as coaching and identifying the right help for everyone. Work coaches also felt sometimes they provided support that was not typical to their role to claimants with complex needs, e.g., linking to adult social services. Claimants felt work coaches provided practical support as well as emotional support such as boosting confidence, reassurance, and motivation.

Preparation was considered more important when doing a WSR with a claimant from the caseload of another work coach. A lack of information or time to prepare was thought to negatively affect claimant experience.

<u>Channel preferences</u>

There was an even split of claimant preferences between face-to-face, telephone, video, and no preference. The claimants who had no preference stated they lived close to their jobcentre. Some claimants suggested a hybrid approach with mixing face-to-face and video across their WSRs. Work coaches thought most claimants would prefer video and a few thought there would also be a preference for telephone.

Some work coaches described preferring the initial meeting to be face-to-face then using their judgement to decide on the channel for subsequent WSRs. Video was generally the preference when things were progressing smoothly. Some face-to-face WSRs were felt to still be required to complete paperwork, make referrals, or get claimant signatures.

The face-to-face channel was viewed positively. Work coaches thought face-to-face was easier for some claimants to open up, easier for English for Speakers of Other Languages (ESOL) claimants and easier to get a sense of what a claimant was like. Claimants said it was easier to have conversations face-to-face, information was clearer, and it was easier to remember discussion topics. Claimants also valued access to employers in the jobcentre and work coaches giving on screen demonstrations. Some claimants disliked the jobcentre environment.

Telephone was viewed by work coaches and claimants as more convenient, saving claimants time and money. This was cited as especially relevant for those with physical or mental health conditions. Work coaches thought the time saved on travel could be spent on job search activity. However, work coaches thought claimants could be distracted doing something else during the call or be hard to get hold of by telephone. They also did not like that they could not see body language.

Video was considered to be similar to face-to-face but more convenient. Work coaches thought it was well suited to young people, those with physical or mental health conditions and those who have found work. Work coaches and claimants thought technical difficulties with video were a problem. Work coaches flagged that not everyone would have access to the technology, it would not suit ESOL claimants, and there was no screen sharing. Work coaches did not feel comfortable using video with every claimant and some claimants did not like video.

Claimant motivation and goals

Some claimants found the routine of WSRs helpful for staying motivated in their search for employment. Some described having usual job search activities they do each week. After their WSR, claimants said they had looked for work via the internet, newspapers, asking in shops or pubs and looking for physical job notices.

Claimants were mostly engaged in the WSR meeting and able to look forward. There was no perceived change in engagement during the observed WSR.

Claimant goals were mostly work related, to find employment or for some, to find employment in a specific area. A small number had goals relating to gaining more stability in their life. Claimants thought that the work coach goal was to support them to get a job. A few thought work coaches wanted to get them off UC.

Job search assistance

Some claimants were job searching digitally and most were confident in their digital capability. Claimants were also using more traditional methods; handing out CVs, local papers, notice boards, agencies, previous employers, word of mouth. Work coaches gave interview support, informing of useful websites, addressing health

43

issues, and referring to provision. Work coaches considered any relevant factors for the individual when making recommendations of suitable types of employment. This included the claimant's work history, qualifications, or accreditations held, what they are looking for and their location.

Some claimants felt their work coach supported them to broaden their job search and others thought their work coach was not doing this. Some claimants decided themselves that they wanted to expand their search. Some claimants felt they had received good support, but a few felt the support they had received was lacking.

Recognition of barriers and circumstances

Many of the claimants had a barrier or circumstance that made finding work more difficult. Often claimants were experiencing more than one barrier or difficult circumstance at the same time. Work coaches found out about barriers or circumstances that made finding work difficult and then supported claimants to overcome them. Some barriers were straightforward to resolve, and others were more complex or ongoing. Barriers experienced by different claimants in the research were:

- health issues,

- job search skills,

- digital access,

- digital skills,

- childcare,

- lapsed qualifications,

- access to transport,

- drug addiction,

- financial skills,

- and lack of personal identification.

Job search monitoring and conditionality

Both work coaches and claimants spoke about providing evidence of job search activity. Lists of job applications were kept, and work coaches instructed claimants to record their evidence on their UC account.

Some work coaches felt conditionality needed regular reminders and explanation. Some work coaches did not mention checking understanding if they were confident the claimant understood conditionality. Work coaches thought understanding conditionality was important for helping claimants avoid sanctions. Some claimants were worried about sanctions for non-attendance. The claimant commitment was included in conversations about conditionality and sanctions. Work coaches reminded claimants of their commitments and updated them when necessary.

Claimant-work coach relationship

Work coaches and claimants both thought rapport was important. Work coaches identified five important skills for building and maintaining rapport: listening, being open, honesty, acknowledging and not rushing.

Good engagement from the claimant was seen to be a sign of how good the rapport was. Where work coaches thought the rapport with a claimant was weaker it was attributed to telephone contact being challenging or a lack of face-to-face contact. One work coach thought telephone and video had been positive for building rapport.

Most claimants preferred to see the same work coach as they thought it was better for familiarity, consistency, and rapport. Claimants were largely positive about their relationship with their work coach. Claimants liked being personally remembered, feeling included, and work coaches spending time to explain things to them.

Work coaches motivated claimants by highlighting the positives of having a job and keeping their spirits up.

Frequency and duration of meetings

Some work coaches thought that 10 minutes for a WSR meeting was suitable and some thought that it was too short. Work coaches felt short meetings limited their ability to coach. Longer meetings were thought to be needed for more complex claimants. Some work coaches wanted more discretion over WSR length and frequency.

Most claimants from the observed WSR were having weekly meetings. A small number expressed an opinion on frequency, suggesting less frequent meetings for working claimants or bi-weekly WSRs to give more preparation time.

Outcomes

Work coaches envisioned finding employment as both short- and long-term outcomes for the claimants in the observed WSRs.

Some work coaches did not think the observed WSR would change claimant behaviour, the behaviour of these claimants was considered positive. A small number of work coaches thought there might be a change in behaviour.

Claimants responded positively when asked about the actions set at their WSR. Work coaches also considered the claimants to be progressing. Claimants had received job offers, some permanent, some temporary, some full time and some part time. Some claimants were unable to accept the job offer for practical reasons.

Perceptions

- Of the observed meetings
  - Most of the observed WSRs were described as typical by the work coach or claimant.
  - Work coaches considered their observed WSR to be positive overall. Work coach descriptions ranged from 'very well' to just 'ok' or 'fine'.

45

- o Claimants were generally positive about the observed WSR and believed it to be beneficial. A small number thought they did not benefit and considered their WSR experience to be 'average'.

- o For most observed WSRs, the claimant and the work coach had the same perspective, there was one WSR where perspectives differed.

- Overall perceptions of Work Search Review meetings

  - o Work coaches and claimants both saw the purpose of WSR as proactively supporting claimants into work.

Conclusions from video and telephone case studies

- What makes Work Search Reviews effective?

Most meetings covered claimants' work search and specific job vacancies that the claimant had found. Discussions about work aspirations and employment background also featured in meetings.

The claimants who were positive about their WSR valued practical and emotional support from work coaches. The practical support included sharing helpful information, connecting to opportunities (jobs, provision, courses), and someone to talk through options with. Some claimants valued the emotional support of boosting confidence, reassurance, and motivation.

Conditionality was thought to warrant regular reminders and explanation by some work coaches. Claimants for whom the work coach felt confident they had understood conditionality, work coaches did not mention plans to further reinforce or check understanding. Claimants understanding conditionality was seen as important for helping claimants avoid sanctions.

- What are the enablers and barriers surrounding claimants' successful outcomes and work coaches' effectiveness?

Some claimants thought the routine of WSRs helped them stay motivated and some felt work coaches supported them to keep motivated and on task.

Some claimants experienced barriers or difficult circumstances. Work coaches were conscientious about probing for blockers to employment. Where possible they supported claimants to a solution. Some barriers were straightforward to resolve, and others were more complex or ongoing.

Work coaches expressed a desire for more flexibility to choose the right channel and WSR length for the claimant.

Qualitative Comparative Analysis

For each case, the topics discussed in the WSR meeting (e.g., provision options or conditionality) and any relevant factors (e.g., work coach preparation time or rapport) were captured. Each WSR meeting was classified as either most effective, somewhat effective or not effective.

WSRs were classified as effective if either:

- the claimant stated the WSR was helpful, or

- the WSR included action/s that moved the claimant closer to the labour market, for example the claimant accesses provision or the claimant receives interview advice.

The data was examined for any common components amongst the WSRs deemed most effective or somewhat effective. In this sample there were no WSRs classed as not effective.

Phase Two Case Studies: Face-to-face channel

Components of the Most Effective WSRs

In nearly all the most effective WSRs there was a good rapport between claimant and work coach, there were aligned goals between claimant and work coach, the claimant was engaged, and the claimant had future aspirations (see Figure 4.1).
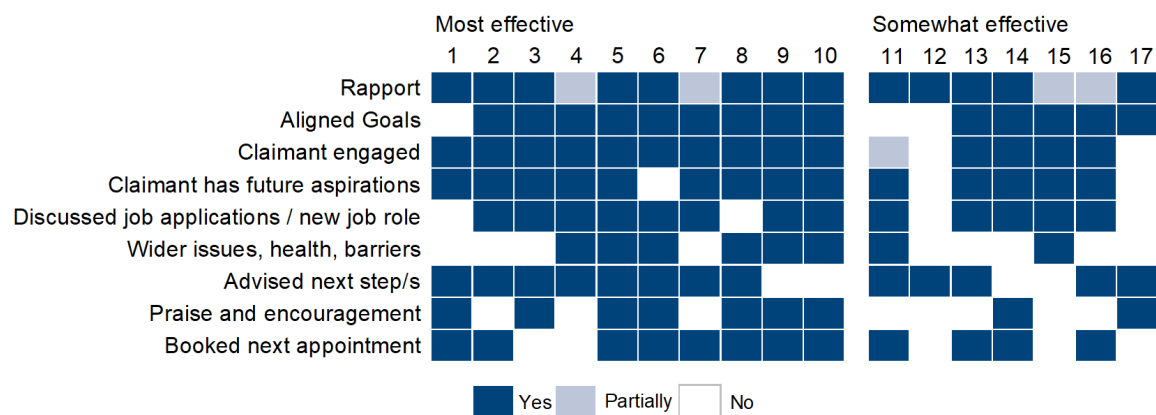
Figure 4.1 Grid representation of the components of most effective (10) and somewhat effective (7) WSRs in Phase 2 case studies: face-to-face channel research. The grid shows where for each of the 17 WSRs a component was present (Yes in blue squares), partially present (Partially in light blue squares) or not present at all (No in white squares).

Praise and encouragement, and discussion of job applications/new job role, were present in the majority of the most successful WSRs. Wider issues, health and barriers were discussed in over half of the most effective WSRs; this frequency was much higher than for the somewhat effective WSRs.

A commitment to meet again was made more frequently in the most effective meetings with the next WSR appointment nearly always being booked in before the WSR finished.

The work coach advising one or more next steps for the claimant to take was common to both the most effective and the somewhat effective WSRs. The frequency was slightly higher in the most effective WSRs.

Rapport

There were some interesting findings linked with rapport. There were three topics that when discussed were nearly always accompanied by good rapport between the claimant and work coach. These topics were skills, skills needs and training; wider issues, health, barriers; and provision options/ provision referrals.

Praise and encouragement from the work coach to the claimant only occurred during meetings where rapport was good.

There was no real difference observed in rapport when the WSR was between a work coach and a claimant from their caseload and work coach and a claimant not from their caseload.

Most discussed WSR topics

The most discussed WSR topics were:

- Discussed or checked job applications
  A work-related topic was discussed in every meeting but discussed or checked job applications was the most common work-related topic.

- Wider issues/health/barriers
  This includes physical health, mental health and any personal circumstances that make securing work more difficult. When wider issues/health/barriers were talked about in a WSR, financial assistance options were often also a topic. Praise and encouragement were observed in most of the WSRs where wider issues/health/barriers were discussed.

- Provision options/referrals
  Often provision and wider issues/health/barriers were both talked about within the same meeting.

Phase Two Case Studies: Telephone and Video channels

Components of the Most Effective WSRs

In nearly all the most effective meetings there was good rapport between the claimant and the work coach, there were aligned goals between claimant and work coach, and the claimant was engaged (see Figure 4.2).
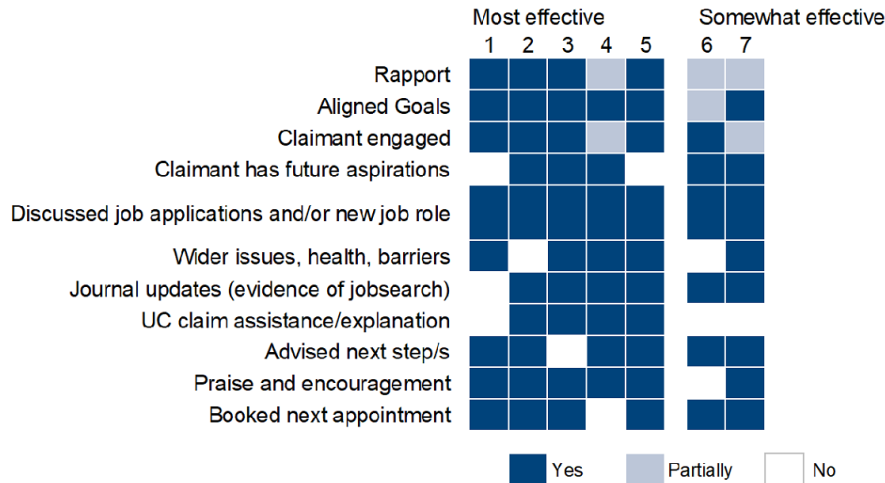
Figure 4.2 Grid representation of the components that were most consistently part of the most effective (5) and somewhat effective (2) WSRs in the Phase Two case studies: telephone and video channels research. The grid shows where for each of the 7 WSR a component was present (Yes in blue squares), partially present (Partially in light blue squares) or not present at all (No in white squares).

Praise and encouragement, and discussion of job applications/new job role, were present in all the most successful WSRs. Wider issues, health and barriers were discussed in nearly all the most WSR, compared to only one of the two somewhat effective WSRs. UC claim assistance/explanation was given in nearly all the most effective WSRs and none of the somewhat effective WSRs.

The next WSR meeting was booked in nearly all the most effective WSRs but also in both the somewhat effective WSRs. Advice on next steps was common to both most effective and somewhat effective WSRs.

Rapport

Wider issues, health and barriers and UC claim assistance/explanation were more frequently discussed when rapport was good.

There was no real difference observed in rapport when the WSR was between a work coach and a claimant from their caseload and work coach and a claimant not from their caseload.

Most discussed **WSR topics**

The most discussed WSR topics were:

- Discussed or checked job applications
  A work-related topic was discussed in every meeting but discussed or checked job applications was the most common work-related topic.

- Wider issues/health/barriers
  This includes physical health, mental health and any personal circumstances that make securing work more difficult. Praise and encouragement were observed in all the WSRs where wider issues/health/barriers were discussed.

- Journal updates (evidence of job search)
  This included any conversation about updating the journal and providing job search evidence.

Consistencies between the Face-to-face and Telephone and Video Case Studies

In both sets of cases the most successful WSRs were underpinned by good rapport between the claimant and the work coach, aligned goals between claimant and work coach, good engagement from the claimant, and praise and encouragement from the work coach. Other important components are a focus on discussing the claimants current job applications and any wider issues, health or barriers.

Good rapport may support the discussion of some topics. In the case studies these topics were skills, skills needs and training; provision options/ provision referrals; wider issues, health, barriers and UC claim assistance/explanation.

Comparisons with previous research

In the Work Coach Interviews research, the most common WSR topics were:

- discussed or checked job applications

- wider issues/health/barriers

- provision options

- current skills/skills needs/training

- claimant commitment/conditionality

Wider issues/health/barriers and job applications were most frequently discussed topics in both the Work Coach Interviews and Phase Two Case Studies: Face-to-face channel research and Phase Two Case Studies: Telephone and Video channel research. Provision options was a high frequency topic in both the Work Coach Interviews and Phase Two Case Studies: Face-to-face channel research.

There were two topics that were discussed less often in the Phase Two: Case Studies compared to the earlier Work Coach Interviews. These were claimant commitment/conditionality, and skills, skills needs and training. The different frequency of skills, skills needs, and training being discussed could reflect the background context of when these WSRs took place. Covid effects were more significant during the Work Coach Interviews. This could show more emphasis on changing industries and/or building skill sets while vacancies were lower.

5. Theory of Change

Overall, the findings support the Theory of Change and COM-B model and highlight the importance of its assumptions. Supporting evidence from the work search reviews research strands for each of the five change mechanisms is summarised below. We also identify where the findings are consistent with existing literature.

Capability – Job search assistance

A common strategy work coaches utilised during WSRs was discussing skills and capabilities with claimants to put them forward for appropriate support and training. Discussing skills and capabilities is used to ensure claimants are directed to particular areas of work and referred to appropriate provision and training (see work coach research), as well as a way to help claimants broaden their job search net (see face to face case studies; DWP, 2016). Finding out a claimant's background, skills, work or training preferences, can help the work coach build up an understanding of what support the claimant may need in getting back to work (see work coach research). Where work coaches used WSRs to actively engage in the claimants' individual journey, this resulted in positive perceptions of the received assistance by claimants (see claimant research).

Work coaches considered what claimants are looking for and their location as well as skills and capabilities when providing job search advice and recommending types of employment (see telephone and video case studies).

Where possible, work coaches prepared for meetings with claimants in order to tailor the advice and direction they gave for work search activities, although commonly there was a lack of time for preparation (see work coach research and face to face case studies). Work coaches also had a wide range of support that they offered - interview preparation, advice on job search, informing of useful websites, addressing health issues and provision (see telephone and video case studies; Liu and others, 2014). In the WSRs new job areas were identified and the meetings were used to maintain claimants' motivation to search and to improve job-search organisation (see claimant research; van Hooft and others, 2021; Cederlof and others, 2021).

Claimants who had more specialised skills and were self-sufficient, did not perceive the help they got from their work coach as helpful (see face-to-face case studies; Cederlof and others, 2021; Behncke and others, 2007), and WSRs tended to be perceived as less effective by claimants whose pre-existing motivation and/or self-efficacy was already high (see claimant research).

The research identified potential barriers to effective WSRs (see claimant research, work coach research, and face-to-face case studies):

- Not tailoring the approach to the claimants' specific circumstances and job-search goals can impede claimant ability to maintain motivation and engage with the labour market.

- Lack of time for preparation or lack of diary space and set targets could lead to unproductive WSRs or limit the effectiveness of WSR meetings.

51

- Lack of knowledge about the claimant's occupational field or level of qualification impeded the usefulness of support the claimant received.

Capability – Recognise and assist in removing barriers

Work coaches often took an approach of first understanding a claimant's current position in relation to skill set, personal circumstances, physical health, mental health and complex needs (see work coach research). Discovering any barriers or circumstances that made finding work difficult allowed work coaches to then support claimants to overcome them.

Many claimants had a barrier or circumstance that made finding work more difficult, including health issues, job search skills, digital access, digital skills, childcare, lapsed qualifications, access to transport, drug addiction, financial skills and lack of personal identification. Some barriers were straightforward to resolve, for example lack of photo ID. Others were more complex or ongoing, for example lack of childcare. Work coaches were then able to tailor the support, provision referrals, training or sign posting to external organisations they offered to move an individual closer to the labour market. Rapport underpinned work coaches' ability to do this (see work coach research).

In addition, WSRs supported general wellbeing, provided benefits information and prompted in-person interactions (see claimant research). Financial support to gain employment and in relation to budgeting was also a part of meeting discussions (see face-to-face case studies). This is consistent with existing literature on understanding claimant barriers which prevents claimants from doing adequate work search (Moran, 2017; Quinio and Burgess, 2019).

Understanding skills, aspirations and personal circumstances allows the better perception of support by claimants. When those were ignored the effectiveness of meetings was undermined (see face-to-face case studies, Drew and others, 2010; van Hooft and others, 2021).

Work coach attributes were a driving factor in claimants' positive experience with WSR meetings. Claimants were very appreciative of work coaches' friendliness, understanding, employment support and professional manner. Several times claimants also mentioned that the work coach drawing on their own experience was also helpful (see claimant research; Behncke and others, 2007). However, the support and understanding was dependent on the work coach's ability to empathise with the claimant. This was easier if they shared similar characteristics and experiences (see claimant research). Work coaches often highlighted that empathy and understanding was needed and they showed this in different ways – sharing own experiences, being more lenient in some cases, or acknowledging the claimant's situation (see face-to-face case studies).

Some claimants were engaged in meetings but were not forward focused to the same extent. This highlights that meeting immediate needs was a priority for some (see face-to-face case studies) or that health or personal circumstances acted as barriers for looking forward (see work coach research).

The research identified the following barrier to effective WSRs (see work coach research):

- Work coaches identified that 10-minute meetings may prevent them identifying and addressing claimant barriers.

Motivation – Support and encouragement

Building a positive bond with claimants was an important strategy used by work coaches (see work coach research). Claimants having a positive rapport with their work coach supports good job search intentions, good job search self-regulation, good job search self-efficacy and confidence, and a focus on goals and plans. It also helps work coaches to identify any barriers to employment (see work coach research; van Hooft and others, 2021). A positive rapport between claimants and work coaches reinforced positive interactions in, and perceptions of, the WSR, supporting better outcomes and better aligned support (see claimant research and face-to-face case studies).

Work coaches discussed long- and short- term goals in WSR meetings with claimants. Positive and goal orientated conversation enabled the support and encouragement mechanism to function. Discussing a claimant's long-term goals also contributed to building rapport (see work coach research; Drew and others, 2010; Grützmacher and Schermuly, 2021).

Work coaches motivated claimants by highlighting the positives of having a job and keeping their spirits up (see face-to-face case studies).

Claimants valued the emotional support from work coaches such as boosting confidence, reassurance, and motivation. Claimants also liked being personally remembered, feeling included and work coaches spending time to explain things to them. Both work coaches and claimants both thought rapport was important (see face-to-face case studies).

The research identified a potential barrier to effective WSRs (see face-to-face case studies):

- Work coaches highlighted the lack of time to prepare before WSRs and the limitation of the motivation and support they can give in 10-minute appointment.

Motivation – Routine

Routine sometimes did not come out naturally in observed meetings. Some claimants saw the meetings as a way to keep them consistent in their work search. This was mostly true for claimants who were not already internally motivated (see claimant research). Some claimants felt that having WSRs over the telephone would disrupt their own routine, while others viewed the possibility of telephone WSRs as an opportunity to better fit with their life and save them time (see face-to-face case studies).

Some claimants found the routine of WSRs helpful for staying motivated. After their WSR, claimants had looked for work via the internet, newspapers, asking in shops or pubs and looking for physical job notices. Some claimants described having usual job search activities they do each week (see telephone and video case studies).

From a work coach perspective, work coaches used routine as a strategy to support claimants with a sense of purpose during unemployment (see work coach research; Delaney and others, 2011). The routine strategy was only used if work coaches felt it was needed and the approach was personalised for each claimant (see work coach research).

Work coaches expressed an appetite for discretion over the frequency and length of meetings to ensure they could have enough time to cover everything they needed to. It is, however, possible that what a work coach considers the 'right' frequency and length for that claimant, might not be right from the claimant's perspective - as evidenced by those claimants who wanted a different frequency (see work coach research).

The work coach's engagement, including time committed to regular communication, was an explanation given for positive overall impressions. Claimants who liked WSRs overall tended to like their work coach. This was expected in the COM-B model, as the need to embed routines would depend on the claimant and an active work coach who would provide more regular support where needed (see claimant research).

The research identified the following barrier to effective WSRs (see face-to-face case studies).

- Lack of discretion over frequency and duration of WSRs could limit the support work coaches could provide to claimants.

Motivation – Challenge, stigma, chore, sanctions

Stigma is included in the change mechanism "Challenge". However, no work coaches referenced any positive effects of stigma. A small number of work coaches stated that they thought stigma was demotivating for claimants and one work coach spoke of trying to change claimants' mindsets away from feeling stigma (see work coach research; Baumberg Geiger, 2015; Krug and others, 2019).

There was a generally held view by work coaches that many claimants did see WSRs as a chore until they realised the potential benefits (see work coach research). Some claimants viewed their WSRs as mostly a compliance measure. This means that they did not see another reason or purpose of the meetings beside conditionality (see face-to-face case studies).

Work coaches often suggested broadening the claimant's work search – challenging claimants' beliefs about what they can do and aim for in terms of jobs. This was mostly perceived positively by claimants but sometimes they were not interested in broadening their job search (see face-to-face case studies; Behncke and others, 2007; Belot and others, 2019).

54

How motivating conditionality and sanctions were differed between claimants. Work coaches thought understanding conditionality was important for helping claimants avoid sanctions. Some work coaches felt conditionality needed regular reminders and explanation. Some claimants were worried about sanctions for non-attendance (see telephone and video case studies).

Work coaches felt it was the financial effects of imposing sanctions and suspending benefit payments that usually affected customer behaviour and encouraged claimant motivation to engage, although it was not effective in every case (see work coach research; Cederhof and other 2021). As suggested by the COM-B model, although monitoring and sanctions might motivate some claimants to increase their job-search activities it may be counterproductive for others (see claimant research). External evidence suggests this might be counterproductive in the long term for those where the threat of sanctions affects their wellbeing (Maibom and others, 2012; Marinescu, 2017). Thus, a balance needs to be struck in the amount of monitoring done. Similarly, the work coach needs to be able to effectively assure claimants through discussing their circumstances and amending their Claimant Commitment.

The research identified potential barriers to effective WSRs:

- Work coaches not feeling comfortable to sanction is a barrier to the effectiveness of the Challenge change mechanism (see work coach research).

- A lack of training on sanctions for newer work coaches could limit their willingness and ability to sanction claimants. Some work coaches reflected that better explanations of sanctions or upskilling new work coaches in relation to conditionality or failure to attend would be helpful (see face-to-face case studies findings).

- Lack of occupational knowledge among work coaches (see claimant research findings) could limit their ability to broaden claimants' work search and the types of jobs they could do.

6.   Conclusions

What makes Work Search Review meetings effective?

Overall, an effective WSR meeting relies on good rapport and a tailored approach from the work coach, taking into account all of the claimant's barriers, skills, motivation and aspiration and providing support in a positive and encouraging manner, while also challenging the claimant's beliefs about what they can achieve (see Figure 6.1).
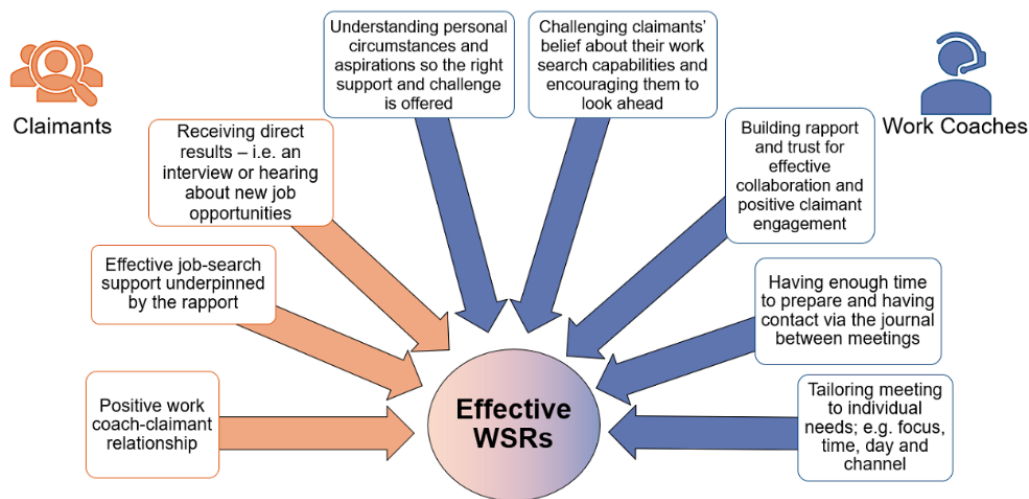
Figure 6.1 The main factors influencing effective WSRs according to claimants and work coaches.

The more successful WSRs were underpinned by a good rapport between the claimant and their work coach, aligned goals between claimant and work coach, good engagement from the claimant, and praise and encouragement from the work coach. Other important components were a focus on discussing the claimant's current job applications and any wider issues, health or barriers. Good rapport was found to support the discussion of some topics.

Many claimants viewed that their successful outcomes were thanks to the support they received from their work coaches. This was more common if they believed that they would not have got these opportunities on their own. However, those that did not find meetings useful, viewed the meetings as mainly a compliance measure or a check-in with unrealistic expectations.

Meetings were perceived as focussed on work and work preparation most of the time as per the policy intent. Claimants perceived meetings as effective if they got direct results – i.e., an interview or hearing about new job opportunities. For claimants with greater self-motivation or better-defined career aspirations, WSRs were thought to be less useful. Claimants with more specialised skills often found there was not much support that they could receive from the Jobcentre.

Explicit conditionality discussions did not routinely come up in the observed WSRs, and most of the time work coaches trusted that their claimants understood what was required of them. However, discussion around mandatory appointments and work search were part of a third of the meetings. Work coaches prioritised building rapport over mentioning sanctions. Work coaches challenged claimants' belief about their work search capabilities and encouraged them to look ahead. This was sometimes negatively and sometimes positively received.

Work coaches identified that effective WSRs are underpinned by building rapport and trust for effective collaboration, tailoring WSRs to individual needs by altering the meeting focus, time, day and channel, and understanding personal circumstances and skill sets so the right support is offered. Other factors that came up as being important for an effective WSR included having enough time to prepare and cover

56

everything during the WSR and being able to use the WSR as an opportunity to remind claimants of their claimant commitment. Work coaches also felt that having contact in between WSR meetings over the journal was important.

Job search assistance and support for claimants went hand in hand with challenging claimant's perceptions about what work they can do and what they can achieve. The success of both was underpinned by a positive claimant-work coach relationship and the investment of the work coach in the claimants' skills and aspirations. When these underpinnings were not present, then the support and challenge were not positively perceived.

What are the enablers and barriers surrounding claimants' successful outcomes and work coaches' effectiveness?

Barriers in claimants' life, stigma about claiming and the rapport with the work coach were considered factors affecting claimants' motivation. Most work coaches however reported variety of strategies to help boost a claimant's motivation.

Claimants had a range of personal circumstances, which may affect their abilities to find work. Some claimants raised concerns about the lack of privacy in Jobcentres or about the presence of screens as creating a barrier – of "them and us".

Good rapport supports the discussion of some topics – skills, skills needs and training; provision options/ provision referrals; wider issues, health, barriers and UC claim assistance/explanation.

Work coaches preferred face-to-face meetings. Claimants were split between face-to-face and telephone, with a preference for journal, telephone or video meetings when those were short and considered only a check-in. Thus, flexibility in channel choice could bring about better experience for claimants.

Work coaches saw preparation as important to WSR success; however, they seldom had sufficient time in their diaries to prepare appropriately. There was also an expressed interest in upskilling particularly around sanctions for newer work coaches.

Overall, claimants wanted more tailored meeting frequency and channel use, and sometimes more detailed support. However, work coaches did not perceive the 10-minute appointment length as sufficient to provide tailored support unless claimants are job ready. Limited time appears to be a recurring issue for work coaches, which impedes them to perform their work efficiently. Mirroring the claimants' desire for more tailoring of meetings, work coaches expressed a desire for the autonomy to work differently with different claimant groups such as those further away from the labour market and providing referrals earlier. Thus, allowing sufficient time for work coaches to prepare and carry out WSR meetings, along with the autonomy to tailor content, frequency and channel of meetings will help increased WSR meeting effectiveness.

Appendices

From all topic guides we have omitted the initial information about the research projects and data protection conversation as it is standard and not pertinent to the content of the topic guides. All participants were informed that their data will be handled according to data protection regulations and were informed about the purpose of the research.

A.1. Phase One Work Coach Topic Guide

Background questions

A1	How long have you been a Work Coach? • How would you describe your role, as a Work Coach? • To what extent do you think you can coach customers?
A2	How many customers are on your current caseload?
A3	Which groups of customers do you work with? • 18-24 and 25+? • Intensive Work Search, light touch, work prep, WFI? • Longer-term customers? • Legacy customers? • Roughly what proportion of your customers are in these groups?
A4	Where are you currently working? Are you in the same location every day? • [If based in a Jobcentre] Are you currently holding any face-to-face meetings with customers? • [If not based in a Jobcentre or answered no to above] Have you ever had a face-to-face meeting with a customer?
A5	Have you ever held a Work Search Review meeting over video?

Preparation (prioritise B1, B2, B2a)

In this section, we're going to talk about Work Search Review meetings with customers in the Intensive Work Search regime.

B1	What would you describe as the role of a Work Search Review meeting? • How do you approach these meetings? • Do you always approach them in the same way, or does it vary?

B2	What would you describe as the role of the claimant commitment? [NB – code if they spontaneously mention sanctioning/consequences]
B2a	Do you feel you have been trained to deliver messages about the consequences of not meeting a requirement?
B3	How do you prepare for a Work Search Review meeting? • Do you look at their journal? • At their claimant commitment? ○ Do you check for mandatory activity? • At the customer history? ○ Do you check whether they have a history of non-compliance (e.g. failing to attend)? • At their job applications? • Do you look at any other information, for example, lists of opportunities, or locally-made spreadsheets?
B4	Do you ever discuss a customer with other Work Coaches or your team leader before a Work Search Review meeting? • How often do you discuss a customer? • Do you have discussion(s) about all customer types, or only some? Why is that?
B4a	How frequently do you hold Work Search Review meetings with each customer? • Do you think that more the frequency of the meetings is about right? • Is it helpful to have more frequent meetings? Why do you say that?
B5	When do you prepare for the work search review meeting?
B6	How long do you spend preparing for the work search review meeting? • Does the amount of time you spend preparing vary? • Would you spend longer preparing for a meeting with a customer having their first Work Search Review meeting with you? • Are there some customers you do not need to spend much time preparing for a meeting with?
B7	Do you do anything in advance if you think the customer might need to be sanctioned? • [If yes] What do you do? • Do you feel confident in your understanding of sanctions?

B8	Do you ever find that you do not have enough time to prepare for a Work Search Review meeting as thoroughly as you would like to? [If yes] Do you sometimes have no time at all to prepare? [If they have ever had a face-to-face meeting] Do you prepare in the same way for telephone meetings as for face-to-face meetings?

Background to most recent meeting (priority section)

For this section, I would like you to think about the most recent Work Search Review meeting which you had with an Intensive Work Search customer, whether it was face-to-face, by telephone or over video.

C1	**Was the meeting face-to-face, over the telephone, or over video?**
C2	**Was this your first Work Search Review meeting with this customer?** [If no] How long had it been since your previous meeting? Roughly how many Work Search Review meetings have you had with this customer? Have these been weekly or fortnightly or less frequent? [If no] Had you had any contact with the customer since their previous Work Search Review meeting? [If yes] How did this contact take place? Over the journal? By telephone? Face-to-face? [If yes] What was the reason for the contact? [If yes] Have you previously discussed sanctions/consequences of not complying with the work search requirements with them? - Did you remind them about the consequences of not complying with the work search requirements in this Work Search Review meeting?
C3	Did you feel well-prepared for the meeting? How long had you been able to spend preparing for the meeting?
C4	Had you planned what you wanted to focus on in the meeting? [If yes] what did you plan to focus on discussing? - Why did you want to focus on this? Was it entirely your idea, or did it come from guidance from team leaders? - Is there anything which you cover in every meeting? - Do you set aside time to build rapport with the customer? [If they have ever had a face-to-face meeting] Do you plan telephone meetings in the same way as face-to-face meetings? [If they have ever had a video meeting] How about video meetings?
C5	**Did you have any concerns about the customer in advance of the meeting?**

	• Did you have any concerns about whether they are meeting their commitments, about their circumstances, or about their physical or mental health?
	    o [If yes] Did you make any adjustments in the meeting in light of these concerns?
	• How often do you have meetings where you have some suspicions about whether the customer is complying with the rules of their benefit?
	    o [If they ever have such meetings] What do you do in that situation?
	• Do you discuss support available to them?

C7	Was the meeting rescheduled for any reason? • [If yes] Why was the meeting rescheduled? Was it because the customer failed to attend? Did the meeting start on time? • [If the meeting did not start on time] Why did the meeting not start on time? Did it affect the amount of time you had for the meeting?

Conduct of previous meeting (priority)

D1	**At the start of the meeting, how engaged was the customer?** • Why do you say that?
D2	**[If they have held a previous meeting] Did you discuss the customer's progress since the last meeting?** • What aspects of their progress did you discuss? • Did you discuss their job search? • Training or provision? • Skills? • Health? o Does the customer have a FIT note? • Anything to do with their benefit/UC? • Other aspects of their life? For example, budgeting?
D3	**Did you discuss the customer's skills in the meeting?** • How do you assess what skills the customer has? • How do you assess what skills the customer needs to develop? • Do you use conversations about skills to identify potential training / provision for customers?
D4	**Did you mention or refer to the claimant commitment in the meeting?** • [If no] Why not? • [If yes] Did you make any changes to their commitments?

	○ [If yes] Why did you make those changes?
D5	**Did you talk about conditionality in the meeting?** • [If yes] Was there a specific reason you talked about conditionality? Why was that? • [If no] Why did you not talk about conditionality? • How often do you talk about conditionality in Work Search Review meetings? • Do you talk more about conditionality with customers in their first few Work Search Reviews? • Has the customer ever been sanctioned?
D6	**Did you talk with the customer about establishing a routine**? • Do you ever set requirements, in the claimant commitment, with the aim of helping them establish a routine? • Is establishing a routine for a customer a factor in deciding when to schedule their next appointment?
D7	**Did you discuss the customer's support network**? • [If yes] Did you make any suggestions for drawing on their support network? • [If yes] Did you suggest any approaches to deal with a lack of support?
D8	Did you refer to the journal? • What aspects of the journal did you discuss? Something they had written in it? Something you had written in it? Their engagement? • How often do you talk about the journal in Work Search Review meetings?
D9	**Did the customer raise any particular issues in the meeting**? • [If yes] What kinds of things did they talk about? • Did you expect them to raise those topics? • Why do you think they raised those topics? • Were you able to discuss those topics? • Did you still have time to discuss what you had planned to cover?
D10	**What kind of topics did you discuss in the meeting?** • Did you talk about using the journal or other aspects of the system, or getting paid? • Did you discuss potential sanctions?

	○ [If yes] Did you feel confident talking about sanctions? Why/why not?
	    ○ [If yes] Did you explain them? Did the customer listen?
	    ○ [If no] Would you feel confident talking about sanctions? Why/why not?
	  • Did you talk about aspects of their life not directly related to their job search?

D11	Did you try to "nudge" the customer into changing their behaviour? • [If yes] How did you do that?
D12	Did the customer talk about the "chore" of claiming? • For example, having to be available at a particular time, spending enough hours per week on their work search, having to travel to the job centre?

D13	Did the customer talk about a "stigma" attached to claiming?
	
	  • For example, feeling ashamed or embarrassed about claiming or attending the jobcentre?
	  • [If yes] Did you address their concerns? How did you do that?

Customer attitudes

E1	**By the end of the meeting, how engaged was the customer?** • Why do you say that? How can you tell whether a customer is well engaged? How can you tell whether a Work Search Review meeting has increased a customer's engagement with their job search?

E2	**Was the customer able to look forward?** To make plans for their job search, and to think about how they will implement them? Make suggestions about what they are going to do themselves?
	
	  • Why do you say that?
	  • How would you respond if an Intensive Work Search customer did not believe that they could find work?

E3	Would you say that the customer wants to find work?
	
	  • What makes you say that?
	  • Do you think anything you have done has changed their desire to find work?
	  • [If no] Have you done anything to try to increase their desire to find work? What do you think might help?

E4	**Did the customer become more negative or more positive during the meeting?**
	• Did you notice the customer's emotional state change during the meeting?
E5	**Do you feel that you have a good rapport with the customer?**
	• Why do you say that? • How do you establish a good rapport with a customer? • What do you do if it is difficult to establish a good rapport?
E6	**To what extent do you think the customer understood the consequences of not doing an adequate work search?**
	• Did they say they understood? • Do you believe that they did understand?
E7	**Did you need to take any action to refer the customer to a decision maker?**
E8	**Overall, would you say that the meeting went well?** **What was the most challenging thing about the meeting?** What was the best thing about the meeting?
E9	**Do you think that the customer will behave differently in future, as a result of this Work Search Review meeting**?
	• For example, turn up on time, perform a better work search, provide more evidence?

Timing and after the meeting

F1	How long was the meeting scheduled to last?
	• How long did it actually last? • Would it have been useful to have longer for the meeting?
G1	What did you do immediately after the meeting?
G2	During the meeting, were there any actions you said that you would take?
	• [If yes] What sort of things were they? • When did you do them? • How long did they take?

Duration and mode of delivery of the meeting

F3	[If the meeting was not held face-to-face] Given a choice, would you prefer to have held this meeting face-to-face? • What would be the advantages and disadvantages of holding it face-to-face? • Are there occasions where a face-to-face meeting would be better?
F4	[If the meeting was not held by telephone] Given a choice, would you prefer to have held this meeting over the phone? • What would be the advantages and disadvantages of holding it by phone? • Are there occasions where a telephone meeting would be better?
F5	[If the meeting was not held as a video call] Would you prefer to have held this meeting as a video call? • What would be the advantages and disadvantages of holding it as a video call? • Are there occasions where a video call would be better?
J1	Would you like the option to conduct Work Search Review meetings as video calls? • What would be the advantages of this? • What would be the disadvantages?
J2	How many of your customers would be able to take part in a video call with you? • What would be the barriers? Are there any groups of customers it would be better or worse for?
F6	Would you prefer to have communicated over the journal instead of having the meeting? • What would be the advantages and disadvantages of communicating over the journal instead? • Are there occasions where it would be better to communicate over the journal?

Channels of communication (can ask fewer questions depending on time)

Thinking about four possible channel of communication (face-to-face, telephone, the digital journal, a video call):

H1	What would be your preferred channel for holding a Work Search Review meeting?
	
	• Would this be the same for all customers?
	    o [If yes] Why is that?
	    o [If no] Which customers would you prefer a different channel of communication?
	• What about customers who live a long way from the Jobcentre?
	• Is one channel better for coaching customers?
	• Would this change once the pandemic is over?

H2	What would be your preferred channel for holding a first commitment meeting?
H3	What would be your preferred channel for holding a commitment review meeting?
H4	How commonly do you contact customers between meetings? • What would be your preferred channel for checking in with customers between meetings? • Do you reinforce messages from the Work Search Review meeting by sending journal messages, or in any other way?

Using the journal

I1	How do you find communicating with customers using the journal?
I2	If a customer posts a question on the journal, how long is it, usually, before you can get back to them?
I3	Are you able to build rapport with customers using the journal?
I4	Can you use the journal to challenge a customer who is not doing what they are supposed to? • Does this get the customer to engage?

Digital Work Search Reviews

K1	Have you ever conducted a digital Work Search Review for a customer?

	• How do you decide when to conduct them? • Have you received any guidance on when to conduct them?
K2	Do the reviews require you to do any advance preparation? • [If yes] What do you do to prepare?
K3	How long does a digital Work Search Review take?
K4	What do you check for when you conduct a digital Work Search Review? • Which parts of the customer account do you look at when you are conducting a digital Work Search Review? • Do you have enough guidance on how to conduct a digital Work Search Review?
K5	Are the digital Work Search Reviews sufficient for their purpose? • Are there circumstances where a digital Work Search Review could replace a Work Search Review held with a customer present?

Conclusion

| L1 | If you could change one thing about Work Search Review meetings, what would it be? |

Thank you for your time…

A.2. Phase One Claimant Topic Guide

Explain to participant that we would like to talk about their experiences of appointments where they have discussed their work search evidence with their Work Coach and not any other types of appointment such as verifying ID. We are calling these meetings "Work Search appointments". If the participant prefers to use a different term that is fine, provided they understand the purpose of the appointments.

SECTION 1: About You

What was the reason you started to claim UC?

- o How long have you been claiming Universal Credit?

What sort of work areas have you previously been involved in?

What types of work are you looking for?

- o Has this changed since start of claim?
- o If yes, why new direction?

Have you ever had any issues with your claim due to Work Search Appointments?

- o What was issue?

Do you have any concerns regarding the Work Search Appointments?

- o E.g. Fear of sanctions?

SECTION 2: Channels

Interviewer note:
Explain to participants that by 'channels' we mean what medium was used for the interviews. For this section we need to identify if the participant has experienced a single channel or multiple channels.

What channels have been used for your Work Search Appointments so far? (Answer can be multiple channels.)
1. Video
2. Online / Journal
3. Telephone
4. Face to Face (F2F)

Have any of the channels been used more frequently than the others?
- o Which channel?

SECTION 2a: If respondent has experienced only one channel

What did you like about this channel?

What did you not like about this channel?

Which channel do you think would suit you best?

- o Why?

Are there any channels you would not want to be contacted via?

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    o Why?

<div align="center">**GO TO SECTION 3**</div>
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SECTION 2b: If respondent has experienced more than one channel

What did you like about each channel?

What did you not like about each channel?

Which channel do you think would suit you best?

    o Why?

Are there any channels you would not want to be contacted via?

    o Why?

<div align="center">**GO TO SECTION 3**</div>

SECTION 3: Recent Meeting

Interviewer note: If possible, we want to achieve an even split between respondents who have experienced the different channels. Our sample includes more people with experience of F2F appointments, so if a participant has experienced more than one channel, please prioritise the least common one.

They are listed below in order from least to most common.
1. *Video*
2. *Online / Journal*
3. *Telephone*
4. *Face to Face (F2F)*

E.g. if participant has experienced video and telephone, talk about their video review; if they've experienced both telephone and F2F, talk about telephone. We do not expect many video or online reviews.
Ask the participant to think about the most recent WSR they had using the priority channel listed above.
If they cannot recall earlier reviews using different channels, just ask about the most recent one.

What did you talk about with the Work Coach in the Work Search Meeting?
[If they cannot remember for the specific meeting ask them what things they generally talk about in those meetings.]

- o Your work search activities?
- o Feedback on your work search activities?
- o Local job opportunities?
- o Training or courses?
- o Referrals to provisions?
- o CV writing?
- o Interview skills?

o Conditionality?   o Actions to complete for next meeting?

Which of the things that you talked about did you find helpful?

Were there any things discussed that you did not find helpful?   o   Was there anything you did not understand?

What were you trying to get out of the meeting?   o Do you feel you achieved that?   o Do you feel more confident as a result of the meeting?

Did you do any preparation for the meeting?   o If so, what preparation did you do?

How did you find the Work Coach?   o How would you describe their attitude towards you (e.g. friendly, etc.)?   o Do you think the channel helped or hindered your rapport with the Work Coach?

Did you feel they understood your personal circumstances?   o If no, what did not the Work Coach understand?

Did you have any concerns regarding your Work Search Appointments?   o Did you mention your concerns to the Work Coach?   o If so, do you feel they listened to your concerns?

Do you think the Work Search Appointments helped with your motivation to find work?
 	
       o More motivated as confidence increased through Work Search Appointments?
 	
       o Feel more able to look forward?
 	
       o More motivated due to threat of sanctions?

SECTION 4: Work Search Appointments in general

What do you think the Work Search Appointments are for?   o   What do you think the Work Coach gets out of the meeting?

What do you personally get out of the Work Search Appointments?
 	
  o   Do you feel able to share your individual circumstances with the Work Coach?
  o   Do you feel they are tailor to your needs?

How long do the Work Search Appointments usually take?   o   Is there enough time to cover all the things you want?
Are there ever any points you do not have time to bring up?   o   If so, what were these?

How often do you have Work Search Appointments?
 	
  • Do you think undertaking regular Work Search Appointments has helped you?
     o   What ways have they helped you (confidence, scope of employment opportunities, etc.)?
  • Have they had the opposite effect?
     o   What has been that negative effect?

Outcomes
Thinking back to your most recent meeting, did you agree any actions?
And did you complete those actions?   o   If no – why not?
Would you have done these actions anyway, without the meeting with your work coach?
Have you done anything differently, as a result of discussions with your work coach?
SECTION 5: Relationships

Do you normally see the same Work Coach?
 	
  o   If no, is it a different Work Coach every time?
  o   Would you prefer to see the same Work Coach at every meeting?

How do you generally get on with your Work Coach?

- How would you describe the way the Work Coach communicates with you?
- Friendly, supportive, etc?
- How do you feel during your meeting? (comfortable or do you feel on edge)

What are your goals?

- What do you think the Work Coach's goals are?

Do you feel that you are both working towards the same goals?

- If no, why?

SECTION 6: Overall thoughts on Work Search Appointments

Overall, do you think that Work Search Appointments help in your search for employment / help you find a job?

- If so, how do you think they are helping you?

Have they helped in any other way?

Probes:

- Help with planning finances?
- Ensuring you're claiming the correct benefits
- Letting your work coach know about any changes to your circumstances e.g. illness
-

Do you feel the Work Search Appointments helped you with any of the following? **Note rate either Yes/No**

- Listing/Understanding? all the skills that I have which could help me find a job
- *Talking to friends and other contacts to find out about potential employers who need your skills*
- Talking to friends and other contacts to discover promising job openings that are suitable for you
- *Completing a good job application and CV*

o   Contacting and persuading potential employers to consider you for a job
      o   *Making a good impression and getting your points across in a job interview*
      o   Searching for jobs online (using computers, smartphones, internet, etc.)
      o   *Applying for jobs online (using computers, smartphones, internet, etc.)*
      o   Getting help in order to become familiar with a new job

What do you like about Work Search Appointments?   o   Is there anything you do not like?
If you could make one change regarding Work Search Appointments, what would you change?

A.3. Phase Two Work Coach Topic Guide

Background questions

A1	How would you describe your role, as a Work Coach? • To what extent do you think you can coach customers?
A1.1	How long have you been a Work Coach? • Did you start before or after the COVID-19 pandemic? (Pandemic started March 2020) ASK PRE PANDEMIC ONLY • Did your approach to work coaching change after the pandemic started? • What was easier/harder about coaching during the pandemic?
A2	How many customers are on your current caseload?
A3	Which groups of customers do you work with? • 18-24 and 25+? • Intensive Work Search, light touch, work prep, WFI? • Longer-term customers? • Legacy customers? • Roughly what proportion of your customers are in these groups?
A3.1	IF ONLY WORK WITH ONE GROUP Are there any particular ways you tailor your approach to this group of claimants? • Do you change your behaviour? • Are there any ways you tailor the claimant commitment for this group?
A3.2	IF WORK WITH MORE THAN ONE GROUP Are there any particular ways you tailor your approach to suit each group of claimants? • Do you change your behaviour? • Are there any ways you tailor the claimant commitment for these groups?
A3.3	Are there any customers on your caseload you do not have Work Search Review Meetings with? • Why is that?
A4	Where are you currently working? Are you in the same location every day? • [If based in a Jobcentre] Are you currently holding any face-to-face meetings with customers? • [If not based in a Jobcentre or answered no to above] Have you ever had a face-to-face meeting with a customer?

Preparation (prioritise B1, B1.1, B2, B2.1, B2.2, B2a)

In this section, we're going to talk about Work Search Review meetings with customers in the Intensive Work Search regime.

B1	**What would you describe as the role of a Work Search Review meeting?** • How do you approach these meetings? • Do you always approach them in the same way, or does it vary?
B1.1	**What do you think customers think Work Search Review meetings are for?** • Support? • Access training? • Disclose barriers/personal challenges? • As a chore? • Just to meet conditionality/avoid sanctions? • To what extent do you think you can influence a customer's behaviour?
B1.2 /C4	How do you usually approach Work Search Review Meetings? • Do you plan what is going to be covered? • Do you always approach them in the same way, or does it vary? • Are there topics that you always try to discuss? Why those topics? • Do you set aside time to build rapport with the customer? • Is your approach the same for face-to-face, telephone and video?
B1.3	How does discussing personal circumstances or barriers (e.g. financial concerns or mental health) impact claimant's closeness to labour market?
B1.4	Have you had information or training provided on the support available to customers for Mental Health, Physical Health or Finances? • Do you know how to refer customers?
B2	**What would you describe as the role of the claimant commitment?** [NB – code if they spontaneously mention sanctioning/consequences] • Do you think the claimant commitment fulfils this role? • Do claimants need reminding about the content of their claimant commitment? Why?
B2.1	**Do claimants understand the conditionality requirements?** • How often do you talk about conditionality in Work Search Review meetings? • Do you talk more about conditionality with customers in their first few Work Search Reviews? • Did you remind them about the consequences of not complying with the work search requirements in this Work Search Review meeting? • Why do you think claimants need reminding about conditionality/ consequences?

75

	• Do you think conditionality is effective?
B2.2	**To what extent do you think sanctions impact customer behaviour?** • How aware are customers about sanctions? • Where do you think their awareness comes from? • Are sanctions something you regularly discuss or refer to in Work Search Reviews?
B2a	**Do you feel you have been trained to deliver messages about the consequences of not meeting a conditionality requirement?**
B7	Do you do anything in advance if you think the customer might need to be sanctioned? • [If yes] What do you do? • Do you feel confident in your understanding of sanctions?

Background to most recent meeting (prioritise C1 and C7)

For this section, I would like you to think about the most recent Work Search Review meeting which you had with an Intensive Work Search customer, whether it was face-to-face, by telephone or over video.

C1	**Was the meeting face-to-face, over the telephone, or over video?**

C2	Was this your first Work Search Review meeting with this customer?
	• [If no] How long had it been since your previous meeting? Roughly how many Work Search Review meetings have you had with this customer? Have these been weekly or fortnightly or less frequent?
	• [If no] Had you had any contact with the customer since their previous Work Search Review meeting?
	    o [If yes] How did this contact take place? Over the journal? By telephone? Face-to-face?
	    o [If yes] What was the reason for the contact?

C5	Did you have any concerns about the customer in advance of the meeting?
	• Did you have any concerns about whether they are meeting their commitments, about their circumstances, or about their physical or mental health?
	    o [If yes] Did you make any adjustments in the meeting in light of these concerns?
	    o Did you apply any easements?
	• How often do you have meetings where you have some suspicions about whether the customer is complying with the rules of their benefit?
	    o What caused you to think this?
	    o [If they ever have such meetings] What do you do in that situation?
	• Do you discuss support available to them?

C7	**Was the meeting rescheduled for any reason?** • [If yes] Why was the meeting rescheduled?

	• Was it because the customer failed to attend (FTA)? What do you do when a customer FTA? Did the meeting start on time? • [If the meeting did not start on time] Why did the meeting not start on time? Did it affect the amount of time you had for the meeting?

Conduct of most recent meeting (priority section)

Again, for this section, I would like you to think about the most recent Work Search Review meeting which you had with an Intensive Work Search customer, whether it was face-to-face, by telephone or over video.

D0/ D10	**What did you talk about with the claimant in the Work Search Meeting?** • Their work search activities? • Feedback on their work search activities? • Customer's goals? • Areas of work? • Local job opportunities? • Training or courses? • Referrals to provisions? • CV writing? • Interview skills? • Claimant Commitment ? • Actions to complete for next meeting? • Skills? • Health? Does the customer have a FIT note? • Anything to do with their benefit/UC? • Other aspects of their life? For example, budgeting? mental health? • Using the journal? • Work Incentives? E.g. FSF, taper rate and Work Allowance
D0.1	**Was this typical of normal topics discussed in Work Search Review meetings?** • Are there any topics you always discuss in a Work Search Review Meeting?
D0.2	**In this Work Search Meeting; did you make any referrals to provisions?** • [If yes] Which provision? • [If yes] What do you do to make a referral?
D2	**[If they have held a previous meeting] Did you discuss the customer's progress since the last meeting?** **Why? (for both yes and no responses)** • How do you define progress? • What aspects of their progress did you discuss? • Job search? Training? Health? Personal circumstances? • Does this vary between different customers? • Are there any types of claimants that typically make more progress? Do these claimants have any common characteristics?

D3	**Did you discuss the customer's skills in the meeting?**
	• How do you assess what skills the customer has?
	• How do you assess what skills the customer needs to develop?
	• Do you discuss areas of work customers are interested in? And skills needed for those?
	• Do you use conversations about skills to identify potential training / provision for customers?
D4	**Did you mention or refer to the claimant commitment in the meeting?**
	• [If no] Why not?
	• [If yes] Did you make any changes to their commitments?
	o [If yes] Why did you make those changes?
D5	**Did you talk about conditionality in the meeting?**
	• [If yes] Was there a specific reason you talked about conditionality? Why was that?
	• [If no] Why did you not talk about conditionality?
D10	**Did you talk about sanctions?**
	• Did you discuss potential sanctions?
	• [If yes] Did you feel confident talking about sanctions? Why/why not?
	• [If yes] Did you explain them? Did the customer listen?
	• [If no] Would you feel confident talking about sanctions? Why/why not?
	• [If yes] Have you previously discussed sanctions/consequences of not complying with the work search requirements with them?
	• Has the customer ever been sanctioned?
E6	**To what extent do you think the customer understood the consequences of not doing an adequate work search?**
	• Did they say they understood?
	• Do you believe that they did understand?
	• Why do you think they do/do not understand?
E7	**Did you need to take any action to refer the customer to a decision maker?**
D6	**Did you talk with the customer about establishing a routine?**
	• Do you ever set requirements, in the claimant commitment, with the aim of helping them establish a routine?
	• Is establishing a routine for a customer a factor in deciding when to schedule their next appointment?
D7	**Did you discuss the customer's support network?**
	• [If yes] Did you make any suggestions for drawing on their support network?
	• [If yes] Did you suggest any approaches to deal with a lack of support?

78

D8	Did you refer to the journal? • What aspects of the journal did you discuss? Something they had written in it? Something you had written in it? Their engagement? • How often do you talk about the journal in Work Search Review meetings?
D9	**Did the customer raise any particular issues in the meeting?** • [If yes] What kinds of things did they talk about? • Did you expect them to raise those topics? • Why do you think they raised those topics? • Were you able to discuss those topics? • Did you still have time to discuss what you had planned to cover?
D11	**Did you try to "nudge" the customer into changing their behaviour, attitudes towards work or to consider additional work areas?** • [If yes] What was the behaviour you were trying to change? • How did you try to "nudge" it?
D12	**Did the customer talk about the "chore" of claiming?** • For example, having to be available at a particular time, spending enough hours per week on their work search, having to travel to the job centre?
D13	Did the customer talk about a "stigma" attached to claiming? • For example, feeling ashamed or embarrassed about claiming or attending the jobcentre? • [If yes] Did you address their concerns? How did you do that?

Customer attitudes (prioritise D1, E1, E2, E3, E4, E5, E5.1, E9)

D1	**At the start of the meeting, how engaged was the customer?** • Why do you say that?
E1	**By the end of the meeting, how engaged was the customer?** • Why do you say that? • How can you tell whether a customer is well engaged? • How can you tell whether a Work Search Review meeting has increased a customer's engagement with their job search?
E2	**Was the customer able to look forward?** To make plans for their job search, and to think about how they will implement them? Make suggestions about what they are going to do themselves? • Why do you say that? • How would you respond if an Intensive Work Search customer did not believe that they could find work?

E3	**Would you say that the customer wants to find work?** • What makes you say that? • Do you think anything you have done has changed their desire to find work? • [If no] Have you done anything to try to increase their desire to find work? What do you think might help?
E4	**Did the customer become more negative or more positive during the meeting?** • Did you notice the customer's emotional state change during the meeting?
E5	**Do you feel that you have a good rapport with the customer?** • Why do you say that?
E5.1	**How do you establish a good rapport with a customer?** • Do you do different things with different customers? • What do you do if it is difficult to establish a good rapport?
E8	Overall, would you say that the meeting went well? • What was the most challenging thing about the meeting? • What was the best thing about the meeting?
E9	**Do you think that the customer will behave differently in future, as a result of this Work Search Review meeting**? • For example, turn up on time, perform a better work search, provide more evidence?

Timing and meeting frequency

F1	How long was the meeting scheduled to last? • How long did it actually last? • Would it have been useful to have longer for the meeting?
F1.1	If the Work Search Review meeting had been longer, what would you have used the extra time for? • Build rapport? • Identify barriers? • Job search encouragement? • Does this vary for different types of customers?
F1.2	Do you think a 10-minute slot is the right length of time for Work Search Review meetings? • [If yes] Why? • [If no] How long do you think Work Search Review meetings should be? Why? • Does the right meeting length vary for different types of customers?

F1.4	How do you think customers would feel about longer meetings? • Increased chore? • Support routine?
B4a	[Note: 18-24 are currently seen weekly, 25+ are currently being seen fortnightly] How frequently do you hold Work Search Review meetings with customers? • How do you decide what frequency is right? • Is it helpful to have more frequent meetings? Why do you say that? • How do you decide if a customer needs meetings less frequently? What factors inform the decision? • Are there any particular claimant groups that would benefit from more frequent or less frequent meetings? Why?
B4b	How do you think meeting frequency impacts the rapport you have with customers?
B4c	What do you think costumers think about meeting frequency? • Would they like more or less? • Why? • Do customers tend to perceive Work Search Review meetings as helpful or as a hassle? Why?
B4d /H4	Is there generally contact with customers between Work Search Review meetings? • What form does this take? • Who instigates contact most? Work Coach or claimant? • What topics are discussed?

Channels of communication (prioritise H0, H1, H1.1)

Thinking about four possible channel of communication (face-to-face, telephone, the digital journal, a video call):

H0	**What channels are most of your Work Search Reviews being delivered by?**

H1	**What would be your preferred channel for holding a Work Search Review meeting? Face-to-face, telephone, video or digital?**
	• What are the advantages and disadvantages of this channel?
	• Would this be the same for all customers?
	  o [If yes] Why is that?
	  o [If no] Which customers would you prefer a different channel of communication?
	• What about customers who live a long way from the Jobcentre?
	• Is one channel better for coaching customers?
	• Would this change once the pandemic is over?

H1.1	**What do you think customers preferred channel would be? Why?** • Are there any barriers to customers using particular channels?
F6	Would you prefer to have communicated over the journal instead of having the meeting? • What would be the advantages and disadvantages of communicating over the journal instead? • Are there occasions where it would be better to communicate over the journal?
H2	What would be your preferred channel for holding a first commitment meeting? Why?
H3	What would be your preferred channel for holding a commitment review meeting? Why?
H4	What would be your preferred channel for checking in with customers between meetings? • Do you follow up agreed actions arising from Work Search Review meetings by sending journal messages, or in any other way?

Using the journal

I1	How do you find communicating with customers using the journal?
I2	If a customer posts a question on the journal, how long is it, usually, before you can get back to them?
I3	Are you able to build rapport with customers using the journal?
I4	Can you use the journal to challenge a customer who is not doing what they are supposed to? • Does this get the customer to engage?

Digital Work Search Reviews

K0	Are you aware of digital Work Search Reviews? • Have you had access to any guidance?
K1	Have you ever conducted a digital Work Search Review for a customer? • How do you decide when to conduct them? • Have you received any guidance on when to conduct them?
K3	How long does a digital Work Search Review take?
K4	What do you check for when you conduct a digital Work Search Review? • Which parts of the customer account do you look at when you are conducting a digital Work Search Review?

	• Do you have enough guidance on how to conduct a digital Work Search Review?
K5	Are the digital Work Search Reviews sufficient for their purpose? • Are there circumstances where a digital Work Search Review could replace a Work Search Review held with a customer present?

Conclusion

L1	If you could change one thing about Work Search Review meetings, what would it be? Why?
L2	If customers could change one thing about Work Search Review meetings, what do you think they would change? Why?

Thank you for your time.

A.4. Phase Two Case Study Topic Guides: Face-to-face

Work Coach Topic Guide

Background questions (prioritise A1, A1.1, A1.2, A1.4, A1.41)

A1	**How long have you been a Work Coach? Have you had any other roles within DWP before this?**
A1.1	(Approximately) **How many customers are on your current caseload? Which customer groups? What is the rough distribution between those?**
A1.2	**How would you describe your role, as a Work Coach?** • To what extent do you think you can coach customers as opposed to guiding/ advising?
A1.3	(Pandemic started March 2020, so if they say more than 2 years, they have started pre-pandemic) ASK PRE PANDEMIC • Did your approach to work coaching change after the pandemic started? If yes, in what way? ASK DURING PANDEMIC • Did your approach to work coaching change with the change in government guidance and easing of restrictions? If yes, in what way? ASK ALL • What was easier/harder about coaching during the pandemic?
A1.4	[ASK DURING PANDEMIC ONLY, if not clear from answer on A1.2, W2W was introduced in Feb 2022] **Did you start before or after Way to Work was introduced?**
A1.41	**ASK PRE W2W?** • Did your approach to work coaching change after W2W? If yes, in what way? • What was easier/harder about coaching with the W2W? • (Probe - Engagement with employers? Easier to sell jobs in other sectors? Greater focus on the claimant commitment)
A2	What channels of delivery have you used for Work Search Reviews? (face-to-face, telephone, video, digital). Does this vary by customer groups? If yes, in what way?
A3	**How often do you work with other WC's claimants?** Do you schedule your own claimants with other WCs? [If yes on any of them] In what circumstances does this happen? Is there a difference seeing claimants who are not on your caseload?

Now I would like to focus on the meetings that I observed. I will cover several of the meetings, to understand your experience of different elements.

Meeting No 1

Preparation (Prioritise B1, B3, B4 and B6)

I first have some background questions about the meeting you had at **TIME 1**

B1	**Was this your first Work Search Review meeting with this customer?**
	• [If no] How long had it been since your previous meeting? Roughly how many Work Search Review meetings have you had with this customer?
	Have these been weekly or fortnightly or less frequent?
	• [If no] Had you had any contact with the customer since their previous Work Search Review meeting?
	    o [If yes] How did this contact take place? Over the journal? By telephone? Face-to-face?
	    o [If yes] What was the reason for the contact?
	• [If no] Has the customer passed the permitted period? (The permitted period is 4 weeks under Way to Work)
	    o [If yes] Is this something you have discussed with the customer? How has the customer responded to the requirement to find jobs in a different sector?
	    o [If yes] Have you made changes to the claimant commitment to reflect this?
	    o [If no] Have you discussed the permitted period with the customer? How did you approach that conversation? How did the customer respond?

B2	[Unless covered in B1] **Was the meeting rescheduled for any reason?** • [If yes] Why was the meeting rescheduled? • [If it was because customer failed to attend (FTA)], What did you do when the customer FTA'd?
B3	**How did you approach this Work Search Review Meeting?** • Did you plan what is going to be covered? If yes, how did you plan? • What were you trying to achieve for this meeting? • Did you consider what employers/ jobs might be a good match for the customer? • How do you decide what jobs will match this customer's skills?

B4	**Did you have any concerns about the customer in advance of the meeting?**
	• Did you have any concerns about whether they are meeting their commitments, about their personal circumstances, or about their physical or mental health?
	    o [If yes] Did you make any adjustments in the meeting in light of these concerns? If yes, what adjustments? If no, why not?
	    o Did you apply any easements? If yes, which? If no, why not?
	• Do you discuss support available to them? If yes, what support did you discuss? How did they respond to that offer of support? If no, why not?

B5	• Do you think this customer understands the conditionality requirements? • Do you think this customer understands about the use of sanctions? • What makes you think this? • Have you discussed conditionality and sanctions with the customer before? How did they respond?
B6	**Do you feel that you have a good rapport with the customer?** • Why do you say that? • Can you give examples of how you established rapport with this customer? • What has been successful/less successful?
B7	[ONLY ASK IF: mental/ physical health or finances was brought up in the meeting] Have you had information or training provided on the support available to customers for Mental Health, Physical Health or Finances? • Do you know how to refer customers this support? • Was the information/training you received sufficient? If no, why not?
B8.1	Have you discussed sanctions before with this customer?
B8.2	Do you feel you have been trained to deliver messages about the consequences of not meeting a conditionality requirement? • [If no] what training/support would you have liked? • Do you feel confident in your understanding of sanctions? • Do you feel comfortable delivering messages about conditionality/sanctions? Why do you say that?
B8.3	Do you do anything in advance if you think the customer might need to be sanctioned? • [If yes] What do you do?

Conduct of most recent meeting (priority section)

For observations where there was no interview with the customer, ask fewer questions. Have 2-3 priority questions from the observations to minimise the time spent on them.
Now let's directly discuss the meeting itself.

C1	**[If they have held a previous meeting] Was this meeting similar or different to previous meetings with this customer? In what way?**
C2	[If they have held a previous meeting] Do you think the Customer has progressed since the last time you saw them? Why? (for both yes and no responses) • How do you define progress?
C3-C15	*[Space used for researchers to ask questions based on what was observed in the meeting]*

C16	[If actions were agreed] Do you think the customer will follow up on the agreed actions?
C17	To what extent do you think the customer understood the consequences of not doing an adequate work search? • Why do you think they do/do not understand?

Customer attitudes (priority items D1, D2, D4 & D5)

D1	**Do you think the customer's engagement changed through the meeting?** • Why do you say that? • Were you trying to change the customers engagement throughout the meeting? • If so, how? • [unless already answered at the beginning of the question] Do you feel you were successful?
D2	**Do you think the customer is able to look forward?** To make plans for their job search, and to think about how they will implement them? Make suggestions about what they are going to do themselves? • Why do you say that?
D3	Would you say that the customer wants to find work? • What makes you say that? • Do you think anything you have done has changed their desire to find work? • [If no] Have you done anything to try to increase their desire to find work? What do you think might help?
D4	**Overall, how do you think the meeting went?** • What was the most challenging thing about the meeting? • What was the best thing about the meeting? • What would have been a successful outcome of this meeting? • What would be a successful outcome in the longer term?
D5	**Do you think that the customer will behave differently in future, as a result of this Work Search Review meeting?** • For example, turn up on time, perform a better work search, provide more evidence?

Timing and meeting frequency

The next questions are about the timing of that meeting.

E1	**Would it have been useful to have longer/shorter meeting with this customer at this point? Why?**
E2	If the Work Search Review meeting had been longer, what would you have used the extra time for? Prompt as needed: • Build rapport? • Identify barriers to work? • Job search encouragement?

	• Does this vary for different types of customers? If yes, in what way?
E3	Would you like to have more frequent or less frequent meetings with this customer? Why?

Channels of communication

Thinking about the delivery channel for this meeting…

H1	**Do you think the channel you used for this meeting helped or hindered the progress of the meeting? Why?** • Rapport • Communication • Understanding circumstances • Trust
H2	What would be your preferred channel for holding this meeting? Why?
H3	What do you think customers preferred channel would be? Why? Does this vary for different types of customers? If yes, in what way?
H4	**Are you going to make contact with the customer before your next meeting? Why/why not?**

Meeting No 2

Now let's move on to the meeting we observed at **TIME 2**

[The questions from Meeting 1 are repeated here but with reference to the second observed meeting]

Meeting No 3

Finally, we will talk about the meeting we observed at **TIME 3**

[The questions from Meeting 1 are repeated here but with reference to the third observed meeting]

Conclusion

J1	If you could change one thing about Work Search Review meetings, what would it be? Why?

Thank you for your time.

Claimant Topic Guide

The claimant topic guide is comprised of two parts. The first was used immediately after the observation or as soon as the claimant was available. It focused on what happened in the observed meeting. The second part was used a week later, when the claimant was re-contacted and was asked about what they have managed to fulfil since the meeting we observed, whether they have any results, if they have followed through on what was discussed with the work coach at the observed meeting etc.

	Part 1 – Initial Interview to be held after the WSR observations
	Interviewer Note: *Explain to participant that we would like to talk about the appointment that they attended earlier and their experiences of appointments where they have discussed their work search evidence with their Work Coach*
	SECTION 1: Before we begin, I would like to ask you some questions about you
A1	**To start, could I please ask how long have you been claiming Universal Credit?** o Is this your first UC claim? o What were you doing prior to claiming UC?
A2	How many Work Search Review appointments have you undertaken since the start of your claim?
A3	**What types of work are you looking for**? o Has this changed since the start of your claim? o Prompt: Sector, hours, travel distance? o If yes – why did you start to look at different [use customer words here – sectors, hours etc.]?
A4	**Has the Work Coach suggested that you broaden your work search areas**? o 'If yes, what suggestions have they made'? o Has the Work Coach recently mentioned any further areas of support that the jobcentre or other provides can help you find a job (Job Fairs, etc)?
A5	**Do you prefer meeting with your work coach face to face**? o If yes, why? o If no, what would you prefer? ▪ (prompts: Telephone, video, discussions over the journal)
A6	**(If more than one previous meeting) Was there anything different in this recent meeting compared to previous ones attended**? o If yes, how was it different? ▪ Duration? ▪ Content?

| | **SECTION 2: Observation**
 Interviewer note:
 This section is to be based on the interview observation. Note some questions |

	for the claimant based on your points of interest from observation of the WSR. Feel free to add a row or two if there are things you think still need exploring based on the observation.

O1	How was the meeting today?
	• Was it more/ less useful than previous appointments? In what way/ why?
	• Would you say it was effective in helping you find a job, or help you in your work search? Why/ why not?
	• **Do you feel you benefited from the Work Search appointment today**?
	    ○ **If yes -** In what way?
	    ○ **If no -** why do you say it was not beneficial? What could have been done to make it more beneficial for you?

O2 - O6	*[Space used for researchers to ask questions based on what was observed in the meeting]*

	SECTION 3: Work Search Appointments in general

B1	What do you think the Work Search appointments are for?
	    ○ Do you think these appointments are effective in helping you find a job or helping with your work search?
	        ▪ What makes you think that? (either reasons for positive or negative)

B2	What do you personally get out of the Work Search Appointments?
	    ○ Do you feel able to share your individual circumstances with the Work Coach? Why/ why not?
	    ○ Do you feel they are tailored to your needs? (if customer does not understand)

B5	**What are your goals for the Work Search Appointments [if any]?**
	    ○ What do you think the Work Coach's goals are?
	    ○ What do you think the Work Coach wants to achieve?

B6	**Do you feel that you are both working towards the same goals**?
	    ○ If yes, why? What does (work coach name) do, to make you feel that you're working together?
	
	    ○ If no, why? What could (work coach name) do, if anything, to make you feel you are working towards the same goals?

B3	**Do you normally see the same Work Coach**?
	    ○ If no, is it a different Work Coach every time?
	    ○ Would you prefer to see the same Work Coach at every meeting?

B4	**How do you generally get on with your Work Coach**?
	    ○ How would you describe Work Coach's interaction with you?
	        ▪ Friendly, supportive, etc?
	    ○ How do you feel during your meetings? (comfortable or do you feel on edge)?
	    ○ Can you give any examples of how the work coach has made you feel … *(insert words from previous response – comfortable, on edge etc)*
	    ○ What is it about (work coach name) that makes you feel … *(insert words from previous questions - supported, nervous etc)*
	    ○

B7	Overall, do you think that Work Search Appointments help in your search for employment / help you find a job? o If so, how do you think they are helping you?

B8	Just to finish, could I please just ask:
	   o Are you 25 and over?
	
	   o Do you identify as:
	       ▪ Man
	       ▪ Woman
	       ▪ Non-Binary
	       ▪ Or do you prefer not to say
	   o How would you describe your ethnicity?(if customer asks what this mean, try giving an example like: for example, I identify as..(eg. White Eastern European)

	Close: Thank you very much for your help. We would like to talk to you again in a weeks' time to help us understand what happens after the interview. If you're happy to help us with this second follow-up, we will offer you a £20 high street voucher at the end of the second interview to thank you for your participation. ***[If agreeable, agree date and time and record in tracker. If interview in person, ask for customer's telephone number]***

	Part 2 – Follow-up Interview to be held one week following initial interview **Note for interviewer:** Re-iterate to participant that we are following up on their appointment where they discussed their Work Search activities with their Work Coach.
	Do you have any questions before we begin?
	Section 1 – Updates from last meeting
C1	• Since we last spoke, have you undertaken any work search related activities? (looked for work) o Are they the things you agreed to do at your last meeting?
C3	• What types of work have you been looking for?
C4	• Have you had any successes?

C5	(modify this questions as needed, or skip and ask customer specific question below)
	
	    o Have you taken up any support that might have been suggested at your interview (i.e., further training, etc)?
	
	           o If yes, what form did this support take?

	Section 2 – Based on previous observations (follow up on questions O1 to O6 from 1st interview)
OA1	Last time we spoke you said that you found the meeting [use summary of customer's views] • How do you feel about the meeting last week now? [Follow up on their view on how beneficial and how effective the meeting was – do they feel the same now or has that changed, and why?]
OA2 - OA5	*[Space for researchers to follow up on questions O1 to O6 from 1st interview]*
C2	• Is there anything else you agreed to do at your last meeting, that you have not been able to do? What was it? Why have not you been able to do so?
	Section 3 – Overall perceptions

	Are there any aspects of the WSR appointments that you like?
	
	    • If yes – what are they?
	           o Is there anything you do not like?

	If you could make one change regarding Work Search Appointments, what would you change?

Close: Thank you very much for your help.

A.5. Phase Two Case Study Topic Guides: Video/Telephone

Work Coach Topic Guide

Background questions (prioritise A1, A1.1, A1.2, A1.4, A1.41, A2, A3, A4)

A1	**How long have you been a Work Coach? Have you had any other roles within DWP before this?**
A1.1	(Approximately) **How many customers are on your current caseload? Which customer groups? What is the rough distribution between those?**
A1.2	**How would you describe your role, as a Work Coach?** • To what extent do you think you can coach customers as opposed to guiding/ advising?
A1.3	(Pandemic started March 2020, so if they say more than 2 years, they have started pre-pandemic) ASK PRE PANDEMIC • Did your approach to work coaching change after the pandemic started? If yes, in what way? ASK DURING PANDEMIC • Did your approach to work coaching change with the change in government guidance and easing of restrictions? If yes, in what way? ASK ALL • What was easier/harder about coaching during the pandemic?
A1.4	[ASK DURING PANDEMIC ONLY, if not clear from answer on A1.2, W2W was introduced in Feb 2022] **Did you start before or after Way to Work was introduced?**
A1.41	**ASK PRE W2W?** • Did your approach to work coaching change during W2W? If yes, in what way? • What was easier/harder about coaching with the W2W? • (Probe - Engagement with employers? Easier to sell jobs in other sectors? Greater focus on the claimant commitment)
A3	**How often do you work with other WC's claimants?** Do you schedule your own claimants with other WCs? [If yes on any of them] In what circumstances does this happen? Is there a difference seeing claimants who are not on your caseload?
A2	**How do you decide which claimants will benefit from the multi-channel journey?**

	• Are there any claimants you would not offer the multi-channel journey to? • Which claimant groups do you think are best suited for video/telephone as compared to regular face to face meetings?
A4	**Are you noticing a difference in your interaction with claimants between the regular [video/telephone] meetings and the face-to face meetings?** • Is there anything you leave specifically to cover in the face-to face meetings that you cannot cover in the other channels? What is it? Why? • Is there anything that is limiting your interactions with customers over telephone/video? What is it? Why? • How often do you feel face-to-face appointments need to be scheduled? • Are you able to build rapport with claimants over video/telephone? • Are you aware of the FTA/ decision maker processed under the multi-channel journey? Have you had to use it?

Now I would like to focus on the meetings that I observed. I will cover several of the meetings, to understand your experience of different elements.

Meeting No 1

Preparation (Prioritise B1, B3, B4 and B6)

I first have some background questions about the meeting you had at **TIME 1**

B1	**Was this your first Work Search Review meeting with this customer?**
	• [If no] How long had it been since your previous meeting? Roughly how many Work Search Review meetings have you had with this customer?
	Have these been weekly or fortnightly or less frequent?
	• [If no] Had you had any contact with the customer since their previous Work Search Review meeting?
	  o [If yes] How did this contact take place? Over the journal? By telephone? Face-to-face? Video?
	  o [If yes] What was the reason for the contact?
	• [If no] Has the customer passed the permitted period? (The permitted period is 4 weeks under Way to Work)
	  o [If yes] Is this something you have discussed with the customer? How has the customer responded to the requirement to find jobs in a different sector?
	  o [If yes] Have you made changes to the claimant commitment to reflect this?
	  o [If no] Have you discussed the permitted period with the customer? How did you approach that conversation? How did the customer respond?

B2	[Unless covered in B1] **Was the meeting rescheduled for any reason?** • [If yes] Why was the meeting rescheduled?

	• [If it was because customer failed to attend (FTA)], What did you do when the customer FTA'd?
B3	**How did you approach this Work Search Review Meeting?** • Did you plan what is going to be covered? If yes, how did you plan? • What were you trying to achieve for this meeting? • Did you consider what employers/ jobs might be a good match for the customer? • How do you decide what jobs will match this customer's skills?

B4	**Did you have any concerns about the customer in advance of the meeting?**
	• Did you have any concerns about whether they are meeting their commitments, about their personal circumstances, or about their physical or mental health?
	    ○ [If yes] Did you make any adjustments in the meeting in light of these concerns? If yes, what adjustments? If no, why not?
	    ○ Did you apply any easements? If yes, which? If no, why not?
	    ○ **Does the channel you used to talk to the claimant help or hinder identifying these concerns?**
	• Do you discuss support available to them? If yes, what support did you discuss? How did they respond to that offer of support? If no, why not?

B5	• Do you think this customer understands the conditionality requirements? • Do you think this customer understands about the use of sanctions? • What makes you think this? • Have you discussed conditionality and sanctions with the customer before? How did they respond?
B6	**Do you feel that you have a good rapport with the customer?** • Why do you say that? • Can you give examples of how you established rapport with this customer? • What has been successful/less successful? • Has the channel helped or hindered building rapport with this customer?
B7	[ONLY ASK IF: mental/ physical health or finances was brought up in the meeting] Have you had information or training provided on the support available to customers for Mental Health, Physical Health or Finances? • Do you know how to refer customers this support? • Was the information/training you received sufficient? If no, why not?
	ONLY ASK IF: sanctions came up in the meeting
B8.1	Have you discussed sanctions before with this customer?

B8.2	Do you feel you have been trained to deliver messages about the consequences of not meeting a conditionality requirement? • [If no] what training/support would you have liked? • Do you feel confident in your understanding of sanctions? • Do you feel comfortable delivering messages about conditionality/sanctions? Why do you say that?
B8.3	Do you do anything in advance if you think the customer might need to be sanctioned? • [If yes] What do you do?

Conduct of most recent meeting (priority section)

For observations where there was no interview with the customer, ask fewer questions. Have 2-3 priority questions from the observations to minimise the time spent on them.

Now let's directly discuss the meeting itself.

C1	**[If they have held a previous meeting] Was this meeting similar or different to previous meetings with this customer? In what way? Via what channel was it?**
C2	[If they have held a previous meeting] Do you think the Customer has progressed since the last time you saw them? Why? (for both yes and no responses) • How do you define progress?
C3 – C15	
C16	[If actions were agreed] Do you think the customer will follow up on the agreed actions?
C17	To what extent do you think the customer understood the consequences of not doing an adequate work search? • Why do you think they do/do not understand?

Customer attitudes (priority items D1, D2, D4 & D5)

D1	**Do you think the customer's engagement changed through the meeting?** • Why do you say that? • Were you trying to change the customers engagement throughout the meeting? • If so, how? • [unless already answered at the beginning of the question] Do you feel you were successful?

D2	**Do you think the customer is able to look forward?** To make plans for their job search, and to think about how they will implement them? Make suggestions about what they are going to do themselves? • Why do you say that?
D3	Would you say that the customer wants to find work? • What makes you say that? • Do you think anything you have done has changed their desire to find work? • [If no] Have you done anything to try to increase their desire to find work? What do you think might help?
D4	**Overall, how do you think the meeting went?** • What was the most challenging thing about the meeting? • What was the best thing about the meeting? • What would have been a successful outcome of this meeting? • What would be a successful outcome in the longer term?
D5	**Do you think that the customer will behave differently in future, as a result of this Work Search Review meeting**? • For example, turn up on time, perform a better work search, provide more evidence?

Timing and meeting frequency (priority items E1)

The next questions are about the timing of that meeting.

E1	**Would it have been useful to have longer/shorter meeting with this customer at this point? Why?**
E2	If the Work Search Review meeting had been longer, what would you have used the extra time for? Prompt as needed: • Build rapport? • Identify barriers to work? • Job search encouragement? • Does this vary for different types of customers? If yes, in what way?
E3	Would you like to have more frequent or less frequent meetings with this customer? Why?

Channels of communication (priority section)

Thinking about the delivery channel for this meeting…

H1	**Do you think the channel you used for this meeting helped or hindered the progress of the meeting? Why?** • Rapport • Communication • Understanding circumstances

	• Trust
H2	What would be your preferred channel for holding this meeting? Why?
H3	**What do you think customers preferred channel would be? Why? Does this vary for different types of customers? If yes, in what way?**
H4	**Are you going to make contact with the customer before your next meeting? Why/why not?**

Meeting No 2

Now let's move on to the meeting we observed at **TIME 2**

[The questions from Meeting 1 are repeated here but with reference to the second observed meeting]

Meeting No 3

Finally, we will talk about the meeting we observed at **TIME 3**

[The questions from Meeting 1 are repeated here but with reference to the third observed meeting]

Conclusion

J1	If you could change one thing about Work Search Review meetings, what would it be? Why?
J2	If you could change one thing about the multi-channel journey, what would it be?

Thank you for your time.

Claimant Topic Guide

	Interviewer Note: *Explain to participant that we would like to talk about the appointment that they attended earlier and their experiences of appointments where they have discussed their work search evidence with their Work Coach*
	SECTION 1: Before we begin, I would like to ask you some questions about you
A1	**To start, could I please ask how long have you been claiming Universal Credit?** • Is this your first UC claim? • What were you doing prior to claiming UC?
A2	How many Work Search Review appointments have you undertaken since the start of your claim? • How many of your appointments have been over video/telephone? [choose based on the type of meeting observed]
A3	**What types of work are you looking for**? o Has this changed since the start of your claim? o Prompt: Sector, hours, travel distance? o If yes – why did you start to look at different [use customer words here – sectors, hours etc.]?
A4	**Has the Work Coach suggested that you broaden your work search areas**? o 'If yes, what suggestions have they made'? o Has the Work Coach recently mentioned any further areas of support that the jobcentre or other provides can help you find a job (Job Fairs, etc)?
A5	**How do you prefer to meet with your work coach – telephone, video, face to face**? o Why? ▪ Do you think the channel you used today [video/telephone] helped or interfered with what you wanted to achieve in the meeting? In what way?
A6	**(If more than one previous meeting) Was there anything different in this recent meeting compared to previous ones attended**? o If yes, how was it different? ▪ Duration? ▪ Content? ▪ Channel (face to face, telephone/ video)

SECTION 2: Observation **Interviewer note:** *This section is to be based on the interview observation. Note some questions for the claimant based on your points of interest from observation of the WSR. Feel free to add a row or two if there are things you think still need exploring based on the observation.*

O1	How was the meeting today?
	   • Was it more/ less useful than previous appointments? In what way/ why?
	   • Would you say it was effective in helping you find a job, or help you in your work search? Why/ why not?
	   • **Do you feel you benefited from the Work Search appointment today**?
	       o **If yes -** In what way?
	       o **If no -** why do you say it was not beneficial? What could have been done to make it more beneficial for you?

O2 – O6	*[Space used for researchers to ask questions based on what was observed in the meeting]*

	SECTION 3: Work Search Appointments in general

B1	What do you think the Work Search appointments are for?
	   o Do you think these appointments are effective in helping you find a job or helping with your work search?
	       ▪ What makes you think that? (either reasons for positive or negative)

B2	What do you personally get out of the Work Search Appointments?
	   o Do you feel able to share your individual circumstances with the Work Coach? Why/ why not?
	   o Do you feel they are tailored to your needs? (if customer does not understand)

B5	**What are your goals for the Work Search Appointments [if any]?**
	   o What do you think the Work Coach's goals are?
	   o What do you think the Work Coach wants to achieve?

B6	**Do you feel that you are both working towards the same goals**?
	   o If yes, why? What does (work coach name) do, to make you feel that you're working together?
	   o If no, why? What could (work coach name) do, if anything, to make you feel you are working towards the same goals?

B3	**Do you normally see the same Work Coach**?
	   o If no, is it a different Work Coach every time?
	   o Would you prefer to see the same Work Coach at every meeting?

B4	**How do you generally get on with your Work Coach**?
	   o How would you describe Work Coach's interaction with you?
	       ▪ Friendly, supportive, etc?
	   o How do you feel during your meetings? (comfortable or do you feel on edge)?
	   o Can you give any examples of how the work coach has made you feel … *(insert words from previous response – comfortable, on edge etc)*
	   o What is it about (work coach name) that makes you feel … *(insert words from previous questions - supported, nervous etc)*

B7	Overall, do you think that Work Search Appointments help in your search for employment / help you find a job? 　　o If so, how do you think they are helping you?
B8	Have you agreed when your next meeting with your work coach is going to be? 　　• If yes – is this meeting going to be over video/telephone/face-to-face? 　　• If no – how will you find out when your meeting is going to be?
B9	Just to finish, could I please just ask: 　　o Are you 25 and over? 　　o Do you identify as: 　　　▪ Man 　　　▪ Woman 　　　▪ Non-Binary 　　　▪ Or do you prefer not to say 　　o How would you describe your ethnicity? (if customer asks what this mean, try giving an example like: for example, I identify as..(eg. White Eastern European)
	Close: Thank you very much for your help. We would like to talk to you again in a weeks' time to help us understand what happens after the interview. If you're happy to help us with this second follow-up, we will offer you a £20 high street voucher at the end of the second interview to thank you for your participation. ***[If agreeable, agree date and time and record in tracker. If interview in person, ask for customer's telephone number]***

	Part 2 – Follow-up Interview to be held one week following initial interview **Note for interviewer:** *Re-iterate to participant that we are following up on their appointment where they discussed their Work Search activities with their Work Coach.*
	Section 1 – Updates from last meeting
C1	Since we last spoke, have you undertaken any work search related activities? (looked for work) 　　o 　Are they the things you agreed to do at your last meeting?
C3	What types of work have you been looking for?
C4	Have you had any successes?
C5	(modify this questions as needed, or skip and ask customer specific question below) 　　• Have you taken up any support that might have been suggested at your interview (i.e., further training, etc)? 　　　o If yes, what form did this support take?
	Section 2 – Based on previous observations (follow up on questions O1 to O6 from 1st interview)

OA1	Last time we spoke you said that you found the meeting [use summary of customer's views] • How do you feel about the meeting last week now? [Follow up on their view on how beneficial and how effective the meeting was – do they feel the same now or has that changed, and why?]
OA2 – OA5	*[Space for researchers to follow up on questions O1 to O6 from 1st interview]*
C2	Is there anything else you agreed to do at your last meeting, that you have not been able to do? What was it? Why have not you been able to do so?
	Section 3 – Overall perceptions
	Are there any aspects of the WSR appointments that you like? • If yes – what are they? o Is there anything you do not like?
	What do you think about talking to your work coach over [video/telephone]? Like/dislike them? Why? • Would you like to have more appointments face to face with your work coach? Why? • Has the work coach told you that you will have some face-to-face appointments? • [If yes] What do you plan to discuss with the work coach at face-to-face appointments? Is this different from what you talk about • What do you think about having face to face meeting as well as video/telephone? • Is there anything that you would not talk to your work coach on your regular [video/telephone] meetings and wait for the face-to-face meeting? What is that? Why?
	If you could make one change regarding Work Search Appointments, what would you change?

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