

**Higher Education Careers Services
Unit (HECSU)
and
Graduate Prospects Ltd**

**Managing e-guidance
interventions within HE careers
services: a new approach to
providing guidance at a distance**

Executive Summary and Index

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Graduate Prospects

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Preface

This is the executive summary of a report of a Graduate Prospects Ltd project commissioned by the Higher Education Careers Services Unit (HECSU). The aim of the action research project has been twofold:

1. to develop a web-based e-guidance system in which HE careers services can manage and administer a local careers advice via email service to their own students and graduates; and
2. to explore the whole issue of guidance at a distance and its implications for HE careers services and their clients.

The report starts by describing the background to the project and the rationale for developing the e-guidance management software. It acknowledges the growing trend amongst students and graduates to email their university careers services for careers advice and the ad-hoc procedures adopted by HE careers services in replying to email requests. The report describes how the e-guidance software currently used in the national web-based graduate careers advice service, Graduate Questiontime, has been adapted and modified to provide a web-enabled management system. This new system offers a streamlined process for not only encouraging students to submit their careers queries, but for careers services to respond to queries, access detailed monitoring routines and use integrated client feedback mechanisms.

The report introduces the five participating HE careers services and identifies their planned research objectives and targets. It also illustrates how each of the five services have used the e-guidance software and different approaches to managing their e-guidance services – including a comparison with how the national Graduate Questiontime service is managed.

This report provides detailed evaluations of the e-guidance software, as well as evaluations on the actual e-guidance service each careers service offers to its own students and graduates. Evaluations on the impact of marketing and promoting this type of guidance provision is provided, as is an analysis of the monitoring statistics and usage figures. The evaluations also analyse in detail the types of indicators of success each careers service works to, including customer satisfaction, integration with existing guidance provision, range of and reaching to new and existing client groups, quality of service, effectiveness and sustainability.

A key chapter in the report analyses the actual quality of advice provided by the e-guidance services and discusses whether this is actually guidance or not. As part of this evaluation, the report identifies a range of current thinking and argument regarding the issues of guidance at a distance and includes an analysis of the guidance process, what we mean by guidance outcomes, developing dialogue and interaction and also how counselling and therapy are using email and Internet.

The final chapter presents our key learning points and the issues which arose from the project. We believe that these issues will constitute the key questions that need to be answered by anyone setting up a similar email/web-based service, since they offer significant strategic and professional alternatives. These issues include whether to provide a team or personalised approach to your e-guidance service, whether to offer an embedded service or additional service, should it be offered as a stand-alone service or contextualised within your existing guidance services, what skills and training will be required for your staff and what ethical issues need to be considered?

Within the areas of advice, guidance, counselling and therapy, the UK continues to experiment with on-line and off-line delivery. The e-guidance debate continues to raise issues of how to deliver e-guidance, whether it should be integrated, can it deliver real human

interactions and dialogue. We hope that this action research project and report makes a significant contribution to this debate.

Copies of the full report can be had from Lucy Madahar, Graduate Prospects,
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1. Executive Summary

1.1 Graduate Prospects Ltd set up a 12-month e-guidance action research project. The aim of which was to test the possibility of extending a system used to deliver the national Graduate Questiontime e-guidance service, to current students and graduates of a number of local HE careers services and to explore the whole issue of guidance at a distance. The pilot services were delivered initially by five careers services, who were able to completely customise and brand the web-based email system for their use, while the software continued to run in fact on Graduate Prospects servers.

1.2 The project began in June 2002 and ran until December 2003 with five HE careers services at the universities of Bradford, Middlesex, Strathclyde, De Montfort and Liverpool Hope. A further six have also piloted the e-guidance software but did not contribute formally to the research, despite providing feedback on the technology. All technical support and maintenance was provided by Graduate Prospects Ltd.

1.3 Access to the system for enquirers was from branded links on the individual careers services' web site, and a range of other aspects of the system including feedback email requests to clients, monitoring statistics, automated thank-you replies and access permission levels could be configured by the local service. Brief details of the user and the topic of their enquiry are gathered before allowing them to submit a query.

1.4 Monitoring statistics are readily available in standard graph format and client feedback, in two stages, is collected automatically according to parameters decided by the local service.

1.5 Team versus personalised or specialist approach. In three out of four of the pilot services, the enquirer's question was normally fielded anonymously by the next available adviser or staff member, so interaction was with the system rather than a person. At Liverpool Hope, one adviser had sole responsibility for the service and used her name in all communications, while Strathclyde negotiated a redesign of the registration form so that topic headings selected and the subject discipline of the enquirer triggered a response from the adviser or other staff member appropriate to that topic and faculty. Here, too, advisers used their own names in replying to emails. Advantages of a personalised approach are that it may tend to encourage the building of rapport with the user, ensuring continuity in case of any follow up, and could be more attractive to the users. In the specialist format used at Strathclyde, it can also avoid staff having to tackle questions outside their normal areas of expertise. The team approach, on the other hand, has the advantage of guaranteeing a swift response within a larger service, three days being the standard turnaround time generally maintained.

1.6 Access via Prospects Net. In the longer term, HE careers services will be able to access the software for this system only as a module that can be selected through Prospects Net. The software for the latter will be available for general use from May 2004. It is the aim of Graduate Prospects and the E-guidance team to undertake further work with IAG Partnerships during 2004, extending the use of the system to adult guidance organisations in general.

1.7 Marketing and Use. Wide ranging and comprehensive marketing of the service in most of the pilot sites did not necessarily bear the anticipated fruit. Numbers of users appeared initially disappointingly low compared to the (with hindsight) rather ambitious target figures. Most places probably received queries from 1-3% of their eligible population, compared with a roughly estimated 10-12% for face-to-face services. Differences in marketing strategy do not seem to have impacted on these figures across the pilot sites. However, the figures, although smaller than expected, are actually in-line with those achieved, albeit from a much larger eligible population, by Graduate Questiontime nationally. There are some signs that

returns on marketing investment may be observed only over a longer period than 12 months, and that many current users actually first heard of the service while on-line. Strathclyde, which only marketed the service as part of its normal publicity does not appear to have lagged behind as a result.

1.8 Types of query were differently categorised from one service to another but a generally popular category across the board appears to have been Further Study. Also frequently asked about are: <how to explore your options>, <career changes> and <identifying vacancies> (Strathclyde), <applications>, <job sources> and <occupational choice> (Bradford), <finding a job>, <career choice>, and <applying for teacher training> (Middlesex), <searching for jobs> and <application enquiries> (De Montfort), and <general guidance and information>, and <career change> (at Liverpool Hope).

1.9 Time Management raised various issues, including the length of time taken to answer – widely varying from a few minutes to a full hour and more depending on the familiarity of the adviser with the subject, the nature of the question itself, and the availability of templates or other resource from which to cut and paste. It neither saves, nor costs, time. Each pilot site took a different approach to allocating staff time, from regular diary slots for all advisers, to fitting the emails in as they come. Peak times for use occur in the autumn, with a lower demand later in the academic year. Some experienced a second smaller peak from July onwards. Local circumstances and arrangements affect this significantly. In Bradford 68% of use was during office hours on weekdays, though others felt that the freedom to submit queries 24/7 was genuinely appreciated.

1.10 Characteristics of users. There appears to be no particularly significant gender imbalance – it goes one way in some places, the other way elsewhere – though the national service has significantly more queries from women (60%) than from men. Other personal characteristics are hard to collect: email is relatively anonymous, unless users choose to reveal anything about themselves. Subject disciplines vary from one institution to another, with no discernible trend, while geographic location shows significant numbers may use the system while living within easy reach of the actual careers centre.

1.11 Indicators of success

- **customer satisfaction** – the feedback gathered automatically by the system shows the overwhelming majority in most places regard the email service as a useful and user friendly facility. Those who have not used it have not done so, it would appear, because, despite heavy marketing, they simply did not know about it. The main problem is to make it known and keep it so.
- **integration** – the service is not seen as a stand-alone alternative, but as a complementary part of the existing service. In more than one case it has been used as a preparatory activity to the face-to-face interview, and, in one, linked to curriculum modules. The placing of the access point on the web site is also important – most services chose to make it an alternative reception area by adding it to the front page, but Strathclyde in particular, decided an approach more consistent with needs-based principles would be to add it at those points in the web site where it offered a fall-back position for those with unanswered questions. Integration with other projects and activities is also important and favourable feedback was received from officers of other projects who linked from it, and from some academic staff.
- **range and reach** – the service reached some new groups, notably prospective students, and distance learners, but it is difficult to tell how far those who used it were the same people as use the off-line services too. Graduates are particularly important (45% of users in one case) and, to a lesser extent, international students.

- **quality** – while Graduate Questiontime has already achieved Matrix standards, the pilot email services have not yet taken this test. It is assumed this will be only a matter of time.
- **effectiveness** – the email service is judged by staff as an effective way of using their time, and many are relieved they have not been swamped by it in the first year. Overall evaluation is extremely positive, for slightly different reasons at each service. Recently qualified staff have found it a useful form of professional development. Figures for users themselves are harder to obtain as yet, but such data as there is suggests that feedback is highly positive there too.

1.12 Content of the emails: is it guidance or “only” information and advice? A random but representative and anonymous sample of about 5% of the questions and answers handled by the five pilot services suggests that the most common outcomes of guidance required and delivered are to do with the tactics of getting work and learning, as well as specific information. However, other types of need – for a sharper focus or wider apprehension of the scope of opportunities, as well as greater realism about the labour market and oneself, and support for specific decision making, appear to be tackled. Advisers have taken a professional but slightly conservative approach to the delivery of “guidance” by email. Several believe that it is not in fact possible to deliver guidance as such by this medium. However, evidence also shows that guidance outcomes appear to be delivered this way, and the main concerns are about the process which is perceived as one-way and lacking interaction and dialogue, as well as not achieving the kind of warmth or relationship felt to be present in face-to-face interventions. Nevertheless, examination of the actual emails shows the sparks are there and can be fanned into flame if necessary. Although most emails are one question and one answer, this may lie as much with the perception of the system by client and adviser, especially where the less personalised team approach is used, rather than to the nature of email itself as a medium. Evidence from Graduate Questiontime shows that an **effective interactive dialogue with a client is possible, even within the anonymous system used at national level**. The remaining doubts seem to be about the feasibility of developing on-line rapport or empathy without the use of non-verbal communication. Since this has apparently been tested in personal counselling and therapy, which are increasingly on-line, it is suggested that **email services should be treated as a form of intervention in their own right, not as a pale reflection of face-to-face interactions**. This may make future technical and professional development more rewarding for the guidance practitioner.

1.13 Key issues and learning points

- **team or personalised approaches** – which of these is likely to be better at achieving good responses from users, and more effective management of the system?. There are arguments on both sides which must be decided in the light of local policy and circumstances.
- **embedded or additional services** - there are also some arguments about where such a service is best located – locally, or regionally or nationally. Some of these concern the duplication of resources, versus the face validity of local knowledge. This dilemma is essentially removed by the Graduate Prospects software system which removes the need for local duplication of resources while fully enabling local knowledge to come into play via a customised branded service.
- **stand-alone or contextualised** – there is a question of where the access point should be on the local web site – embedded within relevant pages, in a needs-based format, or on the front page as an alternative reception point for those whose “learning style” draws them to it.

- **training – skills, demands, and opportunities** – there are requirements for technical fluency, ability to analyse a text, and to use a non-directive, informal writing style effectively. At the same time, email offers less experienced advisers an opportunity to build up professional knowledge. Peer review is a useful activity that many of the pilot services have used. Given the availability of the full text of all interactions with clients in the system, to other advisers, exchange of ideas and experiences can be easy to achieve. Possibilities for supervision are also enhanced. Email guidance as described in section 10 also requires experience and specific writing techniques that may not be available naturally, so continuous professional development and exploration is recommended. A checklist for advisers is at appendix one.
- **ethical issues** – all staff should be aware of the issues of security and confidentiality and revisit existing professional codes and standards on this. In the absence of a specific UK set of standards for on-line counselling, it may be worth examining those produced in the USA.
- **attachments** – because of the danger of viruses, CVs cannot be attached to these emails and this causes practical problems and irritation, though the reasons are understood.

1.14 Conclusion

The project has been a signal success in bringing together disparate previous email services and providing a streamlined, monitored system with automatic feedback and data collection. This is widely appreciated. The end-users of the service also appear very happy with the services they have received, and the main impediment to its wider application is the apparent difficulty of ensuring that all eligible users know of it and remain aware of it.

The system can be applied in a variety of ways locally, and integrated with a range of other services on- and off-line. Doubts about its ability to deliver real human interactions and dialogue may have clouded the vision of its potential so far, but these should not be allowed to inhibit robust testing and experimental development in the future. Other areas of advice and guidance in the UK are experimenting with on-line one-to-one delivery, and higher education careers services can make a significant contribution to the debate.