

The Development of Careers Scotland's Service Delivery Framework

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This paper records the processes followed by Careers Scotland in differentiating the services offered to different groups of clients. It is designed to be of use both to Careers Scotland staff and to other organisations that are interested in exploring the adoption of similar models of service delivery.

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1. Introduction

This paper is intended to provide a record of the work of Careers Scotland in developing differentiated services as a key element of the Careers Scotland Operating Model.

It aims to:

- Provide information for staff, managers and stakeholders on progress made to date in the delivery of differentiated career planning services.
- Assist in the ongoing evaluation of this aspect of service delivery and identify further development tasks.
- Contribute to the promotion of guidance policy and practice.

The design of the framework is described in Section 2, the implementation plan in Section 3 and the evaluation process in Section 4. The current operation of the Service Delivery Framework (at the time of writing – early 2006) is explained in Section 5; ongoing and future developments are covered in Section 6.

Careers Scotland delivers career planning services, supported by strategies and products relating to Education in Enterprise, Inclusion and Employability. Its aims are to: (1) improve the employability and enterprise skills of the people of Scotland; (2) increase participation in learning and employment; and (3) be the leading national advocate for the guidance and employability sector. The priorities for service delivery are:

1. *Investing in the workforce of the future: best start for all young people*

Equipping all young people with the underpinning knowledge, skills and enterprising 'can do' attitude they will need to make effective career decisions throughout their lives.

2. *Reducing economic inactivity among young people/narrowing the gap*

Targeting young people (16-19) who are unemployed and those still at school who face specific barriers to employment or are at risk of disengaging.

3. *Improving productivity through personal career planning*

Providing access to personal career planning support for people of all ages (based on career planning need) to secure the best fit between individuals' aspirations and changing labour market opportunities.

Careers Scotland's Operating Model, designed to meet the above strategic aims and priorities, is based on the Career Planning Journey (CPJ), Careers Scotland's chosen guidance model, and on its Service Delivery Framework (SDF).

The Operating Model helps to balance:

- The size of the potential market – approximately 3 million people of working age in Scotland and 4 million potential customers overall.
- The Scottish Executive's aspiration for an 'all-age' career planning organisation.
- The potential levels of demand for Careers Scotland services from different parts of the potential customer base.

The key elements of the Operating Model are:

- Identification of key priority groups across three categories: the Workforce of the Future; People In Work; and People Out of Work.
- Introduction of a new differentiated service framework based on a model of Self-Help, Assisted and In-Depth support. This is underpinned by web-based solutions and capacity-building support for schools and other agencies.
- Improved identification of the career planning needs of customers.
- Agreement of an access strategy, including fewer but better Careers Scotland centres, supported by web, telephone, and outreach channels.
- Development of a performance-management approach that will, over time, demonstrate the difference Careers Scotland makes to the lives of individuals and, in turn, the overall impact of this on the Scottish economy.

This paper is concerned with describing the design and implementation of the Service Delivery Framework element of the Operating Model. It is based on the work of Sampson (2006) at Florida State University, and on the following three assumptions concerning the design and delivery of career resources/services:

1. The funding that is available for the design and delivery of career resources and services is limited, and there are clear expectations from policy-makers that the funding that is provided be used as cost-effectively as possible (OECD & EC, 2004).
2. The effective design and use of career resources and services is a collaborative effort among a variety of public, not-for-profit and private partners who deliver career, educational, training, employment and social services. The synergy potentially afforded by collaboration in the design and delivery of resources and services extends the impact of the funding for any one programme. In this sense, 'the whole is greater than the sum of the parts'.
3. Since the delivery of comprehensive career services for adolescents and adults involves collaborating with partners to varying degrees, it is important to articulate a common understanding of service delivery design with other service providers. It is also important to achieve consensus among collaborating partners on strategies for evaluation and accountability.

2. Design of the Service Delivery Framework

The Service Delivery Framework design adopted by Careers Scotland and described in this paper is a differentiated service delivery model based in part on the Cognitive Information Approach to Career Problem Solving and Decision Making, otherwise known as the CIP approach (Peterson, Sampson & Reardon, 1991; Peterson, Sampson, Lenz & Reardon, 2002; Reardon, Lenz, Sampson & Peterson, 2006; Sampson, Palmer & Watts, 1999; Sampson, Reardon, Peterson & Lenz, 2004).

This section describes how Careers Scotland has adapted the CIP service delivery model to meet the needs of establishing an all-age career planning service in Scotland. A key feature of Careers Scotland's approach is that, whilst it has made use of the CIP approach to design differentiation of services, it has based its theoretical guidance model on the work of Nottingham Trent University's Career Planning Continuum (CPC) model (Allen, Hambly, Malkin & Scott, 1997). The CPC has been subsequently developed by Careers Scotland into the Career Planning Journey.

2.1 Rationale for differentiation of service delivery

Following the publication of the Duffner Report (Careers Service Review Committee, 2000), Careers Scotland was set up as an all-age guidance service in April 2002. It was recognised that traditional service delivery designs which emphasised individualised services, such as the individual guidance interview, could not cope with the increasing demand for services by clients of all ages. Consideration of the cost-effectiveness of career resources and services was essential. It was accordingly agreed that customers of all ages should receive the level of help they need, no more and no less. The aim of the differentiated service delivery model is to provide the right resource, used by the right person, with the right level of support, at the lowest possible cost.

2.2 Adaptation of the CIP model

Careers Scotland's first draft business plan, issued in December 2001, identified the need for service delivery to be differentiated. The national staff task group established to examine how this feature of service delivery could best be introduced recognised the potential role that the CIP model could play in the design of such an approach. The seven key elements proposed for the successful application of the CIP model in practice were described in the Centre for Guidance Studies paper *Who Needs Guidance?* (Sampson, Palmer & Watts, 1999) as follows:

1. Using career theory to help individuals understand and manage career decision-making.
2. Screening individuals for career decision-making readiness before delivering services.
3. Matching levels of staff assistance to identified individual needs.
4. Using the career resource room and internet website with all levels of service delivery.
5. Using career resources that are appropriate for diverse individual learners.
6. Using staff teamwork in delivering services to individuals.
7. Providing common staff training for delivering resources and services.

The following sub-sections focus on how Careers Scotland has adapted the first three of these elements in the design of its own Service Delivery Framework. Elements (4) to (7) are mentioned briefly in sub-section 2.6, and covered in more detail in subsequent sections.

2.3 Element 1: Using career theory to help individuals understand and manage career decision-making

Fundamental to Careers Scotland's contribution to economic development is the role that it plays in the provision of career planning support. The guidance model that was considered most appropriate to support this aim was the Career Planning Continuum developed by Nottingham Trent University (Allen, Hambly, Malkin & Scott, 1997). The Continuum described nine stages in

The nine stages are:

1	2	3	4	W I R D	5	6	7	8	9
I am ready to do some work towards making a career decision	I need to know how to make career decisions	I need to know about my skills and personal qualities in relation to work	I need to understand what jobs and courses demand and what I can bring to them		I need to know where to find out about relevant jobs, courses and training	I need to know how to apply for relevant jobs, courses and training	I need to know what will be expected of me at interviews for my chosen career	I need to know what to do when I get the results of my application	I need to know what to do when things change

the process of reaching and implementing a well-informed realistic career decision.

The Continuum provides Careers Scotland with:

- A model of career planning through which individuals can understand and plan their progression from 'engagement' to employment.
- A framework against which products and services can be mapped, giving all parts of Careers Scotland a common purpose.
- A tool for use within the guidance process – for example, in the guidance interview, in career education programmes and in self-help materials.

Careers Scotland has, in collaboration with staff at Nottingham Trent University, developed the Continuum into the Career Planning Journey to reflect lifelong learning and planning. The Career Planning Continuum has been a key feature in shaping the design of Careers Scotland's approach to guidance for use in one-to-one career planning interviews. It also plays an important role in the assessment of individual needs as part of Careers Scotland's Service Delivery Framework.

(W I R D – Well-Informed Realistic Decision)

2.4 Element 2: Screening individuals/ assessing individual needs

The overall aim of the Service Delivery Framework is to avoid overserving or underserving customers, by ensuring that the level of service provided to an individual is appropriate to their needs. The Career Planning Journey model provides a mechanism for assessing the nature of an individual's career planning needs. Matching the level of service to the nature of individual need will ensure that Careers Scotland uses its resources with optimum effectiveness to drive up customer satisfaction.

The initial screening of individuals can be face-to-face in a Careers Scotland centre, in a school or college, or in a community setting, using open questions such as 'What brings you here today?' Requests for Careers Scotland services are also made 'remotely' through use of the Careers Scotland contact card, by phone, or through the Careers Scotland website. In all cases, the design of the questions used is based on assessing four main areas:

1. *Where is the individual on the Career Planning Journey?*

This provides information on whether an individual is engaged in the career planning process, is undecided, needs help in making a well-informed decision or needs help in implementing their decision. Careers Scotland is actively promoting the Career Planning Journey to all of its customers, to explain the process of career planning and to support the development of career planning skills.

2. *How ready is the individual to make a career decision?*

This is based on assessing an individual's level of 'decidedness' in making a career decision as part of their overall readiness to make choices, which can be categorised as high, medium or low.

3. *What are the barriers to progression and action?*

This indicates the capability of an individual to make a decision, in relation to a range of internal and external factors that may limit or facilitate choice. Barriers may be personal (e.g. lack of skills), social (e.g. lack of a support network from family/friends), economic, or physical (health factors).

4. *What expectations are there of Careers Scotland support?*

Can individuals' expectations be realistically met by the provision of services from Careers Scotland? In particular, this relates to the separate responsibilities of the customer and of the Careers Scotland staff member in reaching and implementing decisions.

Further assessment of needs may follow if an individual demonstrates difficulty in progressing with their career planning. This includes use of:

- SING (Strategies for Identifying Needs in Guidance) tools – a set of assessment measurement tools developed for Careers Scotland by the University of Strathclyde.
- Self-awareness measures, e.g. Skillscape or FEATS.
- Opportunity-awareness guides, e.g. Adult Directions, Kudos, Pathfinder, Careerscape.

Careers Scotland continues to review and develop procedures for assessing needs and is currently piloting use of a Decision-Making Readiness (DMR) assessment tool developed by Education Development International (EDI Ltd) to assist in the initial screening of individual needs.

2.5 Element 3: Matching levels of staff assistance to identified individual needs

The three levels of service provided in Careers Scotland's operating model are: self-help, assisted, and in-depth support.

Levels of service delivery are linked to business planning. They are characterised by Careers Scotland as amounts of staff time recorded in delivering services to an individual customer. A service to a customer requiring between two and four-and-a-half hours is described as 'assisted'; more than four-and-a-half hours of staff time as the provision of 'in-depth support'. Activities that typically make up these time allocations include:

Self-help services

Self-help services involve self-guided use of self-assessment, information, and instructional materials and media, in a Careers Scotland centre, a school/college careers library, or the Careers Scotland website, where resources have been designed for independent use by customers with a high readiness for career decision-making. These self-help facilities are characterised by improved signage in the resource area, specifically designed resource guides, access where possible to the internet, and information on how to access assisted services from Careers Scotland. In addition, through its community guidance strategy, Careers Scotland is developing access to self-help services in a range of community settings including public libraries and local learning/guidance organisations.

Whilst staff assistance for self-help services in library resource areas based in other organisations may be limited, the use of self-help services does not mean that customers do not receive assistance when using career resources in Careers Scotland centres. Careers Advisers and Employment Advisers working in the Centre's contact team make regular 'floorwalking' contact with individuals using career resources, to establish whether they are finding the information they need.

Assisted services

Assisted services involve guided use of assessment, information, and instructional materials and media, in a career resource area, classroom, or group setting, for individuals requiring some support with their career planning. The range of assisted services, as defined by Careers Scotland, includes:

- One-to-one career planning interviews (followed by the issuing of a Career Plan of Action).
- One-to-one and group-work support provided to customers visiting Careers Scotland centres by members of the centre's contact team.
- Classroom career education sessions, targeted group work, short diagnostic interviews, career drop-in sessions and assisted library contacts with students in schools.

In-depth support services

Individual case-managed services involve use of a range of Careers Scotland products and services delivered by Key Workers/Careers Advisers/Employment Advisers to customers with a low level of readiness for career decision-making. This level of support is delivered over a period of time through a number of contacts that are likely to include assisted and possibly some self-help services.

The characterisation of levels of service as amounts of staff time for business planning purposes differs from the CIP approach where delivery levels are described in terms of client need. As noted by Watts (2005), there is potential for confusion in the differing ways that levels of service are described.

2.6 Elements 4-7

Element 4: Using the career resource room and internet website with all levels of service delivery

Improved access to career resources has been the starting point for the delivery of differentiated services in Careers Scotland centres and secondary schools. This has involved streamlining of the resources available, the introduction of colour-coding and improved signposting to make it easier for customers to make use of the career resources, and the preparation of resource guides to explain which resources are available where.

The design of the Careers Scotland website is central to the effective delivery of differentiated services at all three levels. The design of the site is under constant review to ensure that it meets the career planning needs of customers. These developments are described in more detail in Section 5.

Element 5: Using career resources that are appropriate for diverse individual learners

There is ongoing development of career resources and reviewing of suitable products for use in schools and Careers Scotland centres.

Element 6: Using staff teamwork in delivering services to individuals

The delivery of services in the Careers Scotland centres operating the SDF approach has involved the setting up of 'contact teams'. These are described in more detail in Section 5.

Element 7: Providing common staff training for delivering resources and services

The SDF is an essential component of the Careers Scotland Operating Model. All staff involved in the delivery of differentiated services have attended five training modules covering all aspects of this model. Training handbooks covering the introduction of the SDF in schools and Careers Scotland centres were produced and used for locally delivered training organised through the regional SDF implementation groups and by local management teams.

3. Implementation Plan

This section describes the process that Careers Scotland undertook to design and implement a differentiated Service Delivery Framework.

3.1 Defining the business case for changing the method of service delivery

The national task group established in October 2002 to look at how this service delivery approach could be put into practice looked for models that had been developed elsewhere. In the UK, leading work in this field was being developed by the Centre for Guidance Studies at the University of Derby, in association with Professor Jim Sampson from Florida State University. One outcome from this collaboration had been the development of a differentiated services delivery model (Sampson, Palmer & Watts, 1999) adapted from work carried out by Jim Sampson and his colleagues in the USA (Peterson, Sampson & Reardon, 1991; Peterson, Sampson, Lenz & Reardon, 2002;

Reardon, Lenz, Sampson & Peterson, 2006; Sampson, Reardon, Peterson & Lenz, 2004). As discussed earlier, the theoretical base of this model applies cognitive information processing (CIP) theory to the process of career problem-solving and decision-making. The model offers a theoretical rationale for developing a differentiated guidance service based on client need.

As a result of work carried out by the task group on this model, a paper was prepared (Fairweather et al., 2002). This paper provides useful background to the rationale behind Careers Scotland's adoption of a differentiated service delivery approach, a description of the framework and an outline of the pilot implementation plan. The priorities identified in the paper are outlined below.

3.2 Preparing for implementing a differentiated SDF

In December 2002 the task group identified the priorities that would need to be addressed in order to prepare for the introduction of a differentiated SDF. It was recognised that Careers Scotland would have to design the detailed systems and resources required to implement this new approach, as no ready-made blueprint was available from other services. This required Careers Scotland to gather information from staff on current practices for diagnosing client needs and ways of delivering services at the different levels; to obtain consultancy advice on developing new approaches, implications for staff training, and implications for delivery of career education, use of premises and improving access to self-help services; and to pilot different aspects of the framework throughout Careers Scotland in 2003/04.

The priority tasks listed were as follows:

1. Reviewing and streamlining resources for self-help services in Careers Scotland centres, including: reviewing ICT information services and the role of the Careers Scotland website as a 'virtual' Careers Scotland centre; streamlining information resources (ensuring availability of key resources, improving signage, simplifying language used, providing self-help guides); and obtaining feedback from clients on commonly-used resources.

2. Staff training to help all staff understand the reasons for introducing a differentiated SDF approach, with inputs by Deirdre Hughes, University of Derby ('Communicating the Guidance Change Agenda', November 2002) and Professor Jim Sampson, Florida State University (staff conference, February 2003).
3. Choosing Careers Scotland premises for piloting the delivery framework, linked to (i) the Careers Scotland property strategy and (ii) selection criteria to ensure that a range of centres were chosen.
4. Selecting pilot schools, to reflect a range of criteria including geographical, socio-economic and cultural factors.
5. Developing school resources: designing group work and career education resources to develop the self-help skills of pupils, linked to the Career Planning Continuum; re-designing the school libraries in pilot schools to assist self-help and brief staff-assisted services; and providing training for school staff on the new delivery framework and links to the career education national framework.
6. Identifying client needs: providing training for staff in pilot areas on initial identification of client needs; collaborative work with the University of Strathclyde on the design of screening questionnaires; joint work with the Centre for Guidance Studies on developing a career readiness assessment tool; and developing a diagnostic interview format.

3.3 Design and implementation of pilots

The tasks identified above formed the basis of an implementation plan for piloting a differentiated service delivery model, which was included in the paper by Fairweather et al. (2002).

Preparation for the pilots was scheduled to take place between January and July 2003, with the pilots running from July to December 2003. In some areas, aspects of the pilots went 'live' from late May 2003.

To support the design and piloting of the differentiated SDF model in selected Careers Scotland centres and in pilot schools, additional resources were requested, including:

Staff resources required for pilot work in schools and Careers Scotland centres:

- 1.0 FTE Careers Adviser per region (covering development work in centres and schools) for a minimum of 12 months, to develop resources and plan pilot initiatives in six schools and three Careers Scotland centres in each region.
- One Information Adviser deployed for six months to assist in the development of resources and the website.
- 0.5 FTE administration staff per region for six months providing administrative support for pilot initiatives.

Additional financial support required for pilot work:

- Development of resources: literature, IT, furniture, signage and labels.
- Minimum of £500 (negotiable) to be offered to each Phase 1 school to increase the resources in these schools.
- Consultancy work on design of self-help facilities, identification of client needs and staff training.
- Cover support for training of teachers/librarians in Phase 1 schools.
- Costs of adaptation of premises.

The national task group divided preparation activities between four sub-groups: on schools; on Careers Scotland centres; on diagnosis of need; and on evaluation. The approach to evaluation is discussed in Section 4. The following provides a flavour of the preparation and design activities identified in the implementation plan.

Schools

For the initial pilot phase, it was decided to identify and work with six schools per Careers Scotland region. Schools were chosen based on a variety of factors, including: the way careers work was currently organised in the school; ethnic/cultural diversity; and type of institution, e.g. community schools. Key features of the school pilots included negotiation with the schools on all aspects of the new service delivery model, including agreement of school development plans, and the development of:

- Colour-coded classification of resources in the school's career resource library, and improved access arrangements for students.
- Additional self-help materials – e.g. self-help guides and 'Steps to Success' leaflets.
- Group sessions to introduce the differentiated service to students in S4-S6.
- Piloting of diagnostic tools, e.g. the Decision Making Readiness (DMR) assessment tool and SING (Strategies for Identifying Needs in Guidance) tools.
- Flexible delivery of services through the three levels, including drop-in sessions, diagnostic interviews, and group work.
- Information sessions for guidance teachers and school library staff.
- Promotion of the differentiated services through the use of new marketing materials.

Delivery and evaluation of the pilot arrangements in the initial 24 schools was for the most part undertaken between June and December 2003; in addition, towards the end of this period, work began on the improvement of school resource centres in 50% of the remaining schools in the Scottish Enterprise area.

Centres

Three Careers Scotland centres per region were selected for the pilot. These included one city-centre 'flagship' centre in each region, to be used as an exemplar for the new service delivery model. The other pilot centres were chosen to reflect diversity of size, location, catchment area, and type of office layout.

Key features of the pilots in Careers Scotland centres included:

- Involving local managers and staff in developing the pilots.
- Developing and completing premises checklists and development plans for each centre.
- Ensuring that local management arrangements to monitor progress on implementing the pilot were put in place.
- Revising the layout of centres to develop a proactive learning environment rather than a passive waiting area – including the establishment of furniture and materials requirements for centres.
- Preparation of an agreed list of resources for the centres.
- Improving internal and external signage.
- Improving access to self-help facilities.
- Production of additional self-help materials, e.g. self-help guides, and drafts of marketing materials.
- Re-allocating staff roles/responsibilities through staff training.
- Organisation and delivery of training for all staff working in pilot centres, to ensure understanding of aims and to improve skills in the initial diagnosis of client needs; developing and delivering training in floorwalking and meeter-greeter roles.
- Visiting Connexions Services in the East Midlands to examine how self-help services were organised in schools and careers centres there.
- Reviewing the design of the Careers Scotland website.

Diagnosis of client need

From the outset it was recognised that, in order to differentiate services to customers, Careers Scotland would have to have the means to diagnose both customer need and the products and services to meet that need. The national group looking at diagnosis of need examined levels of need in relation to levels of service. It also looked at staff preparedness to carry out the work required, and the training and in some cases upskilling that would be needed. This included:

- Inclusion of diagnosis of needs of clients visiting centres in the floorwalking/meeter-greeter training in pilot centres.
- Meeting held with EDI Ltd (formerly GOAL Plc) and Coventry Connexions to agree piloting of the Decision Making Readiness assessment tool.
- Development by Sheila Semple (Strathclyde University) of diagnostic materials for use by meeter-greeter/floorwalker staff in centres.
- Development of a Careers Scotland 'contact card' for use in Careers Scotland centres, in schools and in the community.

3.4 Roll-out of the SDF in schools and Careers Scotland centres

A development plan was issued in January 2004 for the roll-out of the new differentiated SDF, to be carried out between January and August 2004. The development plan was based on the good practice and developmental recommendations contained in an evaluation report on the SDF (Cameron & Govan, 2004). It outlined the key tasks to be carried out.

It was agreed that the roll-out would include negotiations with all schools, starting in January 2004, to set up improved career resource libraries as the starting-point for the staged implementation process. Transfer of responsibility for the process from the national task group to regional implementation groups was agreed.

A further three Careers Scotland centres in each region were to be adapted as part of the staged implementation of the new SDF. In addition, any new centres, or centres identified for refurbishment, were to be included in the roll-out arrangements.

Key tasks identified in the development plan included:

1. Completion of a training pack for the delivery of differentiated services in Careers Scotland centres, incorporating good-practice guidelines.
2. Training of school staff – especially pastoral-care/guidance teachers and school librarians.
3. Incorporation of the SDF into Partnership Agreements with schools and into Strategic Partnership Agreements with Local Education Departments.
4. Developing the SDF to meet the requirements of students with additional support needs.
5. Liaison between Careers Scotland's staff with responsibility for Career Planning, Employability and Enterprise in Education, to discuss roll-out arrangements.
6. Inviting staff development co-ordinators to join regional implementation groups in order to ensure the timely delivery of all SDF-related training.
7. Agreeing arrangements for the ongoing review and development of network-wide resources available to support the SDF.
8. Reviewing the Careers Scotland marketing strategy and improving marketing materials for the support of differentiated service delivery.
9. Development of a culture of evidence-based and reflective practice to support the roll-out.
10. Preparation of a diagnostic framework strategy paper to inform on-going roll-out of the SDF.
11. Examining the relationship between the SDF, Insight and the customer segmentation process, to ensure that the terminology used to describe the SDF could be clearly understood by staff.
12. Ensuring that an adequate number of public-access PCs with printer resource were available.

3.5 Factors contributing to implementation success

Sampson (2006) offers his views on factors contributing to implementation success:

'Problems in implementing change have more to do with the way in which staff members work together than with whatever specific resources and services are being designed and delivered. In implementing change, "You get what you pay for" is true in most cases. Specific factors judged to contribute to successful implementation include the willingness to repeat steps in the implementation process, allocating enough time and effort for implementation, being clear about staff roles in implementing change, balancing a top-down with a bottom-up strategy for change, providing effective staff training, and recognizing the continuing nature of implementation.'

These steps will be considered in turn.

Willingness to repeat steps in the implementation process

From the start it was recognised that the implementation of the SDF had to be dynamic, requiring ongoing development of resources, premises layout and accompanying staff training. The CIP approach provided a sound starting-point for designing pilot work in Careers Scotland centres and schools, but the pilots themselves became the test-bed for developing the design and delivery of differentiated services in the context of an all-age guidance service. Resources had to be developed, tested in the pilots, redesigned for roll-out and subjected to ongoing review. The design layout of Careers Scotland centres had to be sufficiently flexible to allow for change (e.g. furniture requirements, signage) and the need for staff training had to be continuously reviewed.

Allocating sufficient time and effort for implementation

From the outset, the task group recognised the importance of not underestimating the scale of the task in rolling out a complex framework that required very substantial changes in working practice to take place. But an ambitious timetable

had to be set, in order to make progress and introduce change in a timescale that would meet the approval of funders.

Clarity of staff roles

The task-group role and remit had to be clear from the start, but the design of the framework was subject to change and influence as business imperatives developed during the first three years. Thus customer groupings were defined (through a process of customer segmentation), performance management systems were introduced, and management of the project was transferred from central to regional teams.

Balancing top-down with bottom-up development

The support and vision of senior management was crucial to the success of developing the Service Delivery Framework. But buy-in by staff at the local level was equally important. This meant that a sense of ownership, and consequently a degree of flexibility, had to be created in Careers Scotland centres and schools.

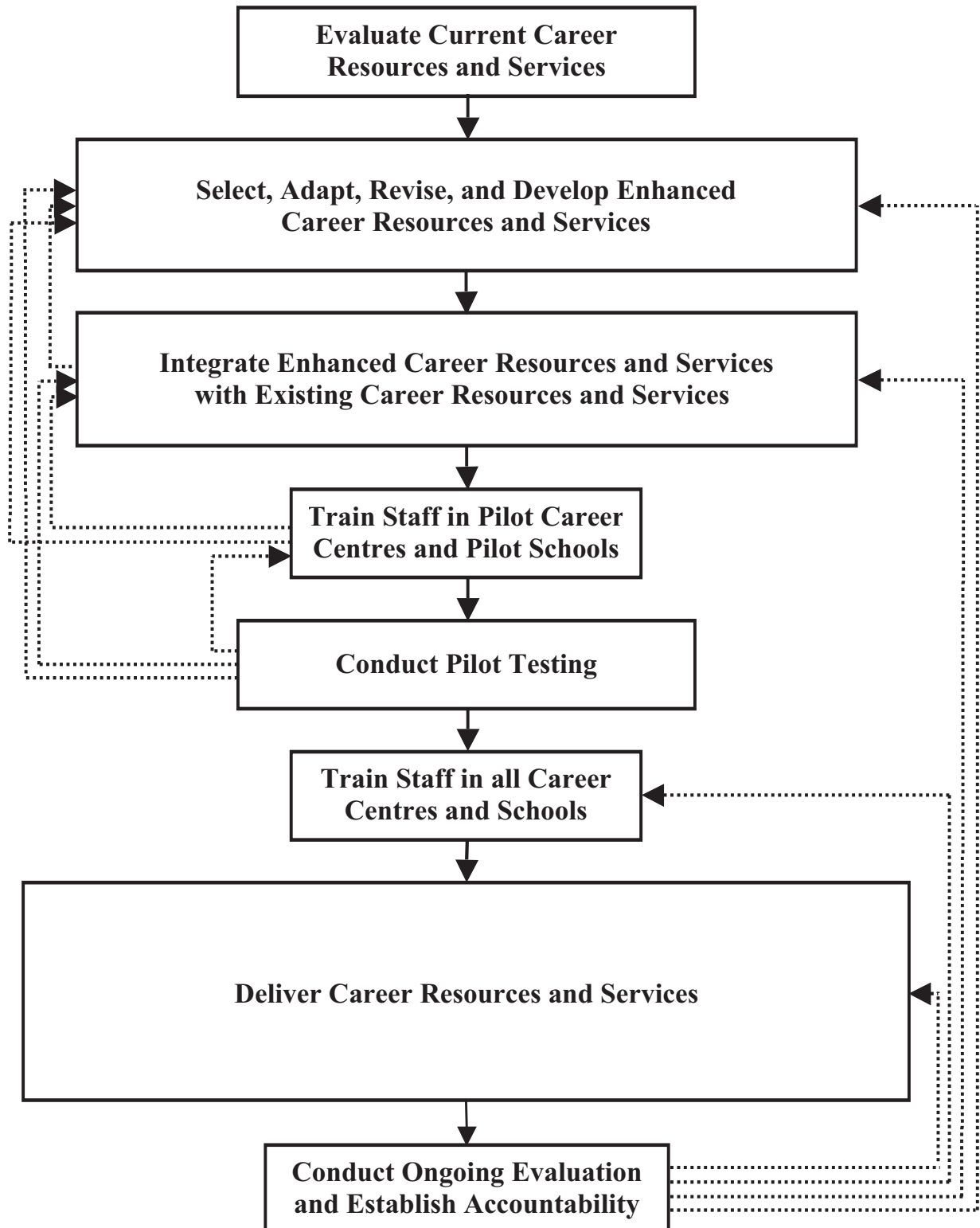
Effective staff training

'Effective staff training is critical to the successful implementation of career resources and services. With only a few exceptions, staff do not like being incompetent at their jobs. Staff concern that they will not be able to answer a question from an adolescent, adult, or a fellow staff member about a resource in the career resource room or on the internet web site leads to anxiety that can then evolve into resistance to any type of change. The thought, "I don't know how to do this" is then verbalized to others as, "This will never work".' (Sampson, 2006).

This training was further consolidated by the development of the training modules provided to staff across the network on the design of the operating model, diagnosis of needs, SDF/Career Planning Journey, Careers Scotland products and services, and evidence-based practice.

Recognising the need for ongoing change and development

The Careers Scotland implementation plan has largely followed Professor Jim Sampson's eight-stage implementation model:



This model recognises the continuous nature of implementing change. Section 6 on page 17 outlines the need for ongoing development.

4. Evaluation and Accountability

Central to the design and implementation of a differentiated SDF in Careers Scotland was recognition that evaluation:

- is an ongoing process that helps to guide continuous improvement in the design and delivery of career resources;
- is a key element of establishing evidence-based practice.

This section outlines the approach to evaluation taken by Careers Scotland in the design and implementation of its differentiated SDF model. In particular, it focuses on the planned formative evaluation activities undertaken. The approach taken was informed by the seven-step implementation process outlined by Sampson & Hughes (2003).

The use of additional evaluation tools that were developed to support the design of the SDF model, such as premises checklists, resource centre audits, and schools and centre development plans, were identified (as indicated in Section 3). This was part of the discussion outlining the implementation of the SDF approach within Careers Scotland.

It was recognised that formative and summative evaluation would provide the basis for improving the design and use of resources and services. Formative evaluation data would be collected and analysed during the development of resources, service delivery elements, and pilot testing, to allow necessary corrections and refinements in the content and delivery of career resources and career planning services. Summative evaluation data were to be collected and analysed after resources and services had been used long enough to acquire sufficient data on their impact.

To date, the evaluation activity undertaken by Careers Scotland has been formative. The design and implementation of Careers Scotland's differentiated SDF model is still evolving. As a result, it has not yet been appropriate to undertake a summative evaluation of this aspect of the Careers Scotland operating model.

4.1 Formative evaluation

The implementation plan for the development of the differentiated SDF model was approved in

December 2002. A sub-group of the national working group was tasked with the development of an evaluation strategy.

From the outset, formative evaluation activity was an integral part of the development process and was designed to gather mainly qualitative information. The main focus of the formative evaluation was to inform the planned roll-out of the new SDF model to schools, colleges and Careers Scotland centres during 2004. From January 2003 a number of on-going formative evaluation activities were developed and undertaken as part of the preparation for the pilots, including the development, use and refinement of audit materials, of development plan templates, of training needs analysis tools and of premises checklists.

The need for a more formal formative evaluation process in relation to the pilots was identified at the outset. The design and implementation of this process is discussed below.

4.2 Formative evaluation of pilots

For the evaluation of the work being undertaken during the pilots, a range of methodologies was used to gather mainly qualitative data. These included: focus groups; questionnaires (hard-copy and interactive); photographs; comment sheets; and desk-top review of implementation tools. The specific methodologies used for the evaluation in schools and centres were as follows:

Schools:

1. 18 school pupil focus groups spread across the 4 Careers Scotland (SE area) regions. A total of 155 pupils from S4 to S6 participated. Focus groups considered the following:
 - Comparison of old v. new layout of careers resources.
 - Impact on accessibility.
 - Ease of use.
 - Availability of resources to meet needs.
 - Knowledge of new model.
 - Impact on how they would access services.
 - Overall satisfaction.
 - Recommendations for improvement.
 - Willingness to participate in future focus group if required.

2. Each of the 25 schools participating in the pilot was asked to complete two questionnaires (one for guidance staff; one for the school librarian) on the following:
 - Implementation process of the pilot.
 - Awareness and knowledge of the delivery model.
 - Impact on their role/work in the school.
 - Awareness of changes to careers resources.
 - Whether the needs of pupils and staff were being met.
 - Overall satisfaction and recommendations for improvement.
3. Implementation checklists and development plans were reviewed.
4. Four focus groups (one in each region), consisting of 19 Careers Advisers working in the pilot schools, considered the following:
 - Implementation process of the pilot.
 - Impact on their role/work in the school.
 - Availability of resources to enable delivery of the new model.
 - Use of diagnostic tools.
 - Availability of resources for pupils.
 - Identification of case studies.
 - Impact on accessibility, availability and suitability of resources for pupils.

Careers Scotland centres:

1. Seven focus groups involving 51 staff working in the pilot centres were undertaken, and the following issues were considered:
 - Implementation process.
 - Impact on work/role in the centre – individual and team.
 - Availability of resources to enable delivery of the new model – to include diagnostic tools, staff development, etc.
 - Availability of appropriate resources for clients.
 - Overall levels of satisfaction.
 - Suggested improvements.
2. Implementation checklists and development plans were reviewed.
3. Clients attending centres during the period from 20 October to 14 November 2003 completed an on-line questionnaire.

A total of 317 forms were completed.

Data were gathered on:

- Comparison of old v. new layout.
- Ease of use.
- Availability of resources that meet client needs.
- Knowledge and understanding of the delivery model.
- Accessibility.
- Overall satisfaction.
- Suggested improvements.
- Willingness to participate in a focus group if required.

4. Staff and client comment sheets were reviewed.

5. A report was prepared by Professor Jim Sampson on progress to date.

The SDF evaluation report identified a mix of 58 good practice and developmental recommendations for the further roll-out of the SDF model in schools and Careers Scotland centres. These were presented to the Careers Scotland senior management team, along with a development plan based on the findings of the SDF evaluation, in March 2004.

4.3 Ongoing evaluation

Regional implementation groups have managed ongoing formative evaluation of the new SDF model. Procedures have varied across the country, but activities have included:

- Regional and centre team implementation plans.
- Focus groups (school students; centre users; staff).
- Audits/staff surveys.
- Use of comments books (staff; service users).
- Regular discussion at team meetings/local SDF implementation groups.
- Staff fora.
- Performance management reports.
- Feedback from Operating Model training.
- Case studies.

4.4 Summative evaluation

To date, a summative evaluation has not been undertaken, due primarily to the fact that key aspects of the Careers Scotland SDF model are still under development. It is anticipated that a summative evaluation will be undertaken in due course. Cognisance of the five-step model of accountability, included in the CIP approach (Sampson, 2006), will be taken when designing the summative evaluation strategy. It is anticipated that a summative evaluation will be consistent with the ongoing development of a Careers Scotland's performance evaluation and quality-assurance frameworks.

5. Service Delivery

This section focuses on describing in more detail the delivery of differentiated services in schools and Careers Scotland centres. Following the publication and approval of the SDF evaluation report, referred to in earlier sections, Careers Scotland began the process of rolling out the SDF approach to all schools and Careers Scotland centres across the Scottish Enterprise area. It is important to recognise that the roll-out of the SDF model took place in the context of a number of other Careers Scotland strategic developments, including the introduction of a channel strategy and the development of a property strategy, amongst others.

The channel strategy is designed to promote access to Careers Scotland's products and services through four different channels:

- **Walk-in** – Careers Scotland centres, resource areas in schools, colleges and outreach centres.
- **Log-in** – web services.
- **Phone-in** – call-centre services.
- **Look-in** – publication and event services.

The following discussion begins by looking at walk-in services, describing differentiation of services in schools and Careers Scotland centres. The remainder of the section considers the delivery of services via the other three channels.

5.1 Walk-in

Careers Scotland centres

Setting up a differentiated service delivery model in Careers Scotland centres has coincided with the development of a property strategy which seeks to move Careers Scotland from often unsuitable to fit-for-purpose premises, whilst at the same time reducing the portfolio of properties. Although this presented a number of challenges, it also offered opportunities to pilot different centre layouts.

In general, there is an area near the entrance of the adapted Careers Scotland centres for greeting customers, providing a welcoming atmosphere that is intended to put customers at ease. Wherever possible there are other areas that include tables and chairs, to allow customers to browse hard-copy materials (look-in strategy), either while waiting for assistance, or on a self-help basis. A number of computers are provided which can be used to offer self-help and assisted services as part of the log-in strategy. Where confidentiality is necessary or desirable, there are private interview facilities, although most customers are happy to have their needs addressed in the resource area.

A set of customer standards has been devised by Careers Scotland and should be on display in every centre. These outline to customers what services are on offer in terms of faxing, phoning, printing and use of the telephone and photocopier in relation to their career planning activities. In terms of health and safety, placement of furniture and the physical design of the centres is designed to facilitate easy visual supervision of resource use by customers.

The client contact team

As outlined in Section 2, screening individuals and assessing their need is a crucial component of ensuring efficient and effective use of resources and this lies at the heart of the Careers Scotland Operating Model. All staff have a key role to play in the delivery of services within Careers Scotland centres. This is recognised in the establishment of client contact teams, to support the delivery of differentiated services. This team involves Careers Advisers, Employment Advisers and, in some areas, Customer Services Assistants, who work as a team to diagnose and meet the needs of the

clients that call into the centre.

All staff in the client contact teams may fulfil the 'meeter-greeter' and 'floorwalker' roles. The meeter-greeter meets the client upon entering the centre and identifies the level of service required (which may involve referral to another staff member). The floorwalker circulates throughout the learning area, supporting self-help/assisted-level clients, and further diagnosing clients' needs.

Depending on the centre size and the number of staff available, the meeter-greeter and floorwalker roles may be combined, rather than distinct, roles. The client contact team ensures that the provision of self-help and assisted services are in operation within a centre's welcome/learning area. A contact period of up to 20 minutes per client can be used for either showing clients how to use the self-help resources, or briefly diagnosing their needs. If it is identified that a client requires further career planning support, this can be addressed immediately where there are sufficient advisers in the centre to staff this. If advisers are not available, a follow-up appointment may be made. 'Next Steps' sheets are used to help students select, locate, sequence and make best use of career resources.

As well as differentiating services, products are differentiated to meet the needs of particular client groups. Although this is an area in which some progress has been made (e.g. products for special-needs clients, young people, and adults) it is one that needs further development to ensure that both layout of resource areas and their content meet the needs of all customer groups. An example of this is whether or not audio or large-print/Braille versions of products are offered, if not in every centre, then at least so that they can be easily accessed when required.

Delivery in schools

It is important to note that the delivery of Careers Scotland products and services is not seen as the sole responsibility of the Careers Adviser(s) linked to a given school. A multi-disciplinary team approach is adopted in the planning and delivery of services. Enterprise in Education Advisers are involved in the training of school staff to deliver the Career Box of career education resources, and participate in the delivery of the Careers Scotland lessons from the Career Box. Employability Advisers work in schools to deliver group sessions

on a range of employability products. This team approach demonstrates the new breadth of services that Careers Scotland has to offer.

The wide range of services now offered by Careers Scotland has led to more variety of approaches to, and flexibility in, service delivery. Detailed discussions have taken place when negotiating Partnership Agreements with schools, to establish the principle of flexible delivery.

The range of products and services available to assist students in their career planning enables career information and career education needs to be met more effectively and efficiently, whilst ensuring that career planning interviews can be targeted at those whose career planning needs are greatest. Self-help resources available to students include:

- Web-enabled services.
- Learning resource centres which are up-to-date, accessible and user-friendly.
- Self-help guides.
- Access to interest guides.
- Access to vacancies in employment, education and training.
- Career planning leaflet – 'Get Where You Want to Be with Careers Scotland'.

Assisted services are delivered in a number of ways. These may include a range of group and one-to-one contacts as students' progress through school and their career planning needs change. Services to which students have access include:

- Careers Scotland Career Box lessons delivered by Careers Scotland staff and school staff to support career education and career planning development needs.
- Enterprise in Education activities.
- Provision of regular career drop-in sessions – usually held in the school library resource centre.
- Diagnostic interviews:
 - Following completion of 'Welcome to Careers Scotland' (a client contact card designed to help diagnose a student's career planning needs), Careers Advisers analyse if there is a need to gather additional information on some students, in order to determine level of need.
 - Meeting for a short period (usually for about five minutes but a maximum of ten

minutes) can be an effective way of gathering such information – this brief face-to face contact may consist of some follow-up interpretive questions, discussion of the Career Planning Continuum, or use of other tools (e.g. the SING tools referred to in Section 2).

- Assisted library contact (one-to-one) – primarily intended to focus on helping the student to use resources/access information for themselves, rather than the Careers Adviser doing it on their behalf. The contact takes place in the library resource centre. The aim is to encourage self-reliance rather than dependency. It may result in students using the career resources available supported by use of 'Next Steps' sheets, or being offered additional career planning support (e.g. a career planning interview).
- Career planning interviews, which generally are scheduled for 45 minutes, and are supported by a variety of resources including: 'Welcome to Careers Scotland', school reports, 'Information About You', the 'Planning Your Career' booklet, and agreement on a Career Plan of Action.

The summative nature of Careers Scotland's definition of in-depth service means that some students receiving an accumulation of assisted services of more than four-and-a-half hours in any one year will be categorised as being in receipt of in-depth support (see also Section 2). This may apply particularly to students with additional support needs and to others who require a case-managed approach.

5.2 Log-in

A key component of the SDF is that services are available to customers via the Careers Scotland website. There are large numbers of the population whose first point of contact will be via the web. All levels of service delivery can include the use of the Careers Scotland website. The website should be available in the career resource area to facilitate customer access to pre-selected, high-quality links to career resources and services. In brief staff-assisted and individual case-managed services, specific content on the website can be assigned as 'homework' between meetings with an adviser.

5.3 Phone-in

This includes the piloting of a Customer Access Centre to manage access to an 0845 number. Once through to the call centre, callers are asked a number of diagnostic questions to determine the service level required. They are then given the information requested, or are directed to products on the website, or are put in touch with their local Careers Scotland centre.

A call centre offers the opportunity to promote events nationally and to respond to national marketing campaigns. It also enables Careers Scotland to offer employers an enhanced service, e.g. as part of a recruitment campaign. An example of this was work done with the National Health Service, which had a marketing campaign to attract more people into the many jobs they had available. The calls for information packs came via the Careers Scotland call centre, which also provided the potential applicants with access to career planning support, resulting in more well-prepared and well-informed applicants.

5.4 Look-in

The final channel discussed here is the look-in channel, which includes the publication of resources and the delivery of events to customers that enhance their career planning activities. Examples of events are higher education events and careers conventions, both of which put customers in contact with potential providers of learning, training or employment opportunities. Careers Scotland inherited a large portfolio of publications. It has, since 2002, been refining these to best meet the needs of customers.

5.5 Community guidance

This paper has focused on differentiated service delivery in Careers Scotland centres and schools, but there is also substantial development of career planning work taking place in the community, linked to community planning (Govan, 2004). This includes front-line guidance training, as part of building the capacity of partners to deliver career planning, and working with partners to improve access to self-help facilities, e.g. the public library service. In addition, Careers Scotland has recently developed and will be implementing a strategy for delivery of career planning services to those in work.

Careers Scotland has, wherever possible, applied the handbook established for work in schools to delivery of services within FE and other outreach settings. As with school staff, FE colleagues have been invited to briefing sessions on the differentiated SDF model. To parallel the approach taken to establishing differentiated service delivery in schools, £500 was offered to establish a resource area in each college and outreach setting where agreement was reached. Discussion on the delivery of differentiated services is incorporated into the negotiation of new Partnership Agreements with colleges.

6. Continuing Development

As mentioned at the end of Section 3, a key factor in achieving implementation success is the need to recognise the continuous nature of implementation and, where necessary, to repeat stages in the implementation process. Much has been achieved to date, but there are important areas of Careers Scotland's SDF that require ongoing review. A crucial development issue, clarifying the relationship between the Career Planning Continuum/Journey model and the SDF, was discussed at an exposition of the models and related developments, held in Glasgow in October 2005. Presentations were made by Careers Scotland staff, by Ann Allen (Nottingham Trent University), by Professor Jim Sampson (Florida State University) and by Professor Tony Watts (University of Derby).

A key message from this event was the agreement between Jim Sampson and Ann Allen that there was congruence between the two models. However, it was also agreed that further work was required on the following three broad areas:

- The relationship between the Career Planning Continuum and the Career Planning Journey.
- The relationship between the Differentiated Service Delivery Model (DSDM) and Careers Scotland's SDF.
- The needs-assessment process.

In relation to Careers Scotland's approach to assessment of needs, it will be essential to clarify, for staff, how a client's progress on the Career Planning Journey/Continuum contributes to making a decision on the appropriate level of service to be provided to the customer.

Other important areas of Careers Scotland's SDF requiring ongoing development have been identified from the following sources:

- The report on *Careers Scotland: Progress and Potential* (Watts, 2005).
- Progress review reports from Professor Jim Sampson (notably Sampson, 2005).
- Reviews conducted by Careers Scotland's regional implementation groups.

They include:

1. Assessment of needs

- More systematic identification of needs of secondary-school students.
- Ongoing review of the 'Contacting Careers Scotland' card used to assist staff in making an initial assessment of client needs in schools and the community.
- Further piloting of the Decision Making Readiness tool developed by Education Development International to assess the decision-making readiness of school students and the possibility of developing a version for working with older clients.
- Encouraging more widespread use by staff of other assessment tools, including the SING tools referred to in Section 2, and psychometric testing including use of FEATS and Skillscape.

2. Clarification on how levels of service are defined

As noted in *Careers Scotland: Progress and Potential* (Watts, 2005) and referred to at the 'exposition' event, there is potential for confusion in the way that levels of service are used to define both customer needs and quantities of staff time recorded for business planning purposes.

3. Staff training / reflective practice

- Ongoing review of training modules, particularly module 2 on assessment of needs, and handbooks/resources for use with new staff.
- Promotion of reflective practice and role of evidence-based practice to allow staff opportunities to share good practice and develop expertise in the delivery of differentiated services.
- Provision of more individualised locally-delivered training on diagnosing needs and use of resources.

4. Ongoing roll-out to all full-time and part-time centres

- Continuing to roll-out the operation of SDF to all full-time Careers Scotland centres.
- Continue to develop ways to operate the framework in part-time centres and shared venues.
- Ongoing development of flexible and differentiated delivery of services in schools and in the community.

5. Development of products and delivery of services at the different levels of delivery

- Improved self-help facilities (hard-copy and web-based).
- Continuing development of public-access IT facilities in Careers Scotland centres.
- Review of the use and design of self-help guides through evidence-based practice.
- Increasing staff knowledge of the content of resource materials through CPD.
- Differentiation of Careers Scotland information products to ensure that they meet the needs of particular client groups.
- Review of the use of 'Next Steps' pads which are designed to help customers make the best use of Careers Scotland services and to decide on their next steps in career planning.
- Development of group-work delivery on employability and career planning skills in Careers Scotland centres, in the community and on employers' premises.
- Develop use of an individual case-managed approach to link disadvantaged young people

who are not in education, employment or training (NEET) to an identified member of staff.

6. Marketing of services

- Develop use of key marketing messages for Careers Scotland centre signage and promotional materials in schools and the community.
- Development of guidelines on marketing to provide a balance between local ownership/flexibility and delivery to network-wide standards.

7. Planning and delivery of a summative evaluation of the SDF as part of Careers Scotland's Operating Model

This summative evaluation will build on the formative evaluation of the school and centre pilots and the local evaluation activities that are being carried out by regional implementation groups.

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