

HECSU research notes

What is e-guidance?

Using Information & Communications Technology Effectively in Guidance Services

This briefing summarises key points and issues arising from several research and development projects commissioned by Graduate Prospects/HECSU in conjunction with NICEC from 2000-2004

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What is e-guidance?

An opportunity to give more guidance to more people, more often, at a distance (Offer et al, 2001, Madahar, 2003)

- In the past, guidance was offered face-to-face or by telephone, letter, book, video or audiotape or by free-standing computer-assisted guidance systems (CAGS).
- Now, a range of information and communications channels is available: web chat, email, on-line discussion forum or message board, and even text message from, and to, a mobile phone. Even the CAGS (e.g. Prospects Planner) are increasingly on-line.
- More people than those who visit the careers centre in person can now be reached - even when that centre is closed or the audience is far away, and cannot (or do not want to) come in. New audiences altogether may be reached or old ones in new ways.
- The decision to do this (or not to) is managerial and professional, not primarily technical.

An integrated system

- These newer forms of intervention can be integrated by intelligent use of a careers service's web site. This can form the hub of an on-line intervention and resource system, and a new gateway to the careers centre's off-line resources and services (Offer et al, 2001).
- For example, first contact with users may be on the web rather than at a physical reception desk. It matters where they go next and in what order, and the site must be designed with this in mind.
- Professional and managerial judgements can ensure that both on-line and off-line pathways are open and properly sign-posted. It is important that none leads to a cul-de-sac, or forces the user back to trial and error to find the right resource or service.

Not just about email...

- E-guidance is not just about email or chat: to be fully effective these tools need to be part of a system, delivering guidance at different levels to meet different needs - a whole which is more powerful than the sum of its parts.
- It is not accidental that Graduate Prospects' national guidance service by email, chat and discussion forum, is web-based, embedded within a comprehensive web site that also offers access to **Prospects Planner**, among many other resources (Madahar, 2003).
- E-guidance should be as coherent a system as its off-line equivalent, with an equally integrated range of activities - informing, assessing, advising, enabling or teaching, as the need requires, and providing clear progression between these activities (Offer et al, 2001).

An effectively-functioning web site

- A careers service web site has many potential functions, including on-line guidance, distance learning, discussion between users or users and advisers, or appropriate referral to other sources of help (Offer et al, 2001).
- Web sites, once just adverts for off-line services, nowadays increasingly reflect the full range of careers service resources - the hub of the service in cyberspace.
- The web site home page acts as a reception point for the first-time user in particular, and must also be designed with such in mind.
- This means the needs of the most common target groups must be anticipated and the structure of the site should reflect professional judgements about how such identified needs are most appropriately met, with links to appropriate resources or services (Offer, 2003).
- Ideally, all members of the staff team should be involved in such judgements.

A managed service

E-guidance services involve management decisions about how they are framed, presented and positioned within the total service offered (Offer et al, 2001, Madahar and Offer, 2004).

An email access point, for example, may

- be on the home page of the web site (offering an alternative to it)
- be located at specific points within the web site (as an option for those who have not met their needs there or who have further questions)
- require the user to register, identify a general category description for their need, and thus start to focus their thoughts and clarify the question
- offer an open-ended opportunity to put any kind of question about careers
- be part of a progression as users move towards more or less personal contact with the service as a whole.

Email enquiries may also

- be dealt with by anonymous and interchangeable advisers, each taking the next enquiry from the in-tray, so as to generate as fast a response time as possible;
- generally involve a sequence of one question and one answer, and fill a slot rather like that of a drop-in session;
- or lead to one-to-one client/counsellor relationships, as in face-to-face interviews;
- invite the client to register with a named (and possibly pictured) individual;
- lead to a dialogue between client and adviser - with several questions and answers.

Such features represent choices, not all of which are exclusive.

Professional identification of needs

- A **needs-based site** has at least three levels: it first identifies its target group(s), then, through the layout of its content and menus, prompts them to identify their needs, and finally matches these needs to relevant resources and services (Offer, 2004b).
- **Resource-based sites** have a shallower structure, and provide quick access to a comprehensive range of resources and services, on the assumption that users already know what they want or can work it out if shown what is available.
- **There are advantages and disadvantages of either approach.** The needs-based site is about effective use of resources, not comprehensive access to them. It aims to get users to the resources that meet their needs, even if they are unclear at the start what these are. Most valuable for first-time or undecided users, it is an attempt to translate traditional guidance principles into the format of a web site. Resource-based sites are most effective with repeat or fairly decided users, but may not serve others so well.
- **These formats are not mutually exclusive** - even on a needs-based site, indexes, site maps and search facilities will allow quick access to resources for those who do not need a more supportive structure.

Templates and related distance learning units on this were made available on the Careers Services' Desk at *Prospects.ac.uk*. There is also a more detailed Graduate Prospects/HECSU briefing on the principles of needs-based design (Offer, 2003).

Statistics of use - who, when, where, what for?

Finding out and recording data on the use of any on-line service, as far as confidentiality and data protection will allow, is obviously a vital management and development tool. The Graduate Prospects/HECSU project (Madahar & Offer, 2004) covering, in the first instance, five pilot careers services, collected a range of interesting statistics on the use of **email services** including the following:

- **How many?** 180-311 enquiries per service were received from July/October 2002 to October 2003, total enquiries being 1362. This represented about 3-4% of current students. The ratio of email enquiries to face-to-face contacts, in any such prospective service, it was suggested, may be around 1 to 4. Even with extensive marketing, services are unlikely to be swamped, as some have feared, by this level of use.
- **Who are they?** Current students, and graduates usually within two or three years of graduating. It is not easy to deduce more from an email message alone. The male/female balance varied from place to place – in some there were more men than women, in others the reverse. [The largest percentage of enquiries to the national service comes from graduates in social, economic and business studies (35%) and arts & humanities (34%). Graduates using Graduate Questiontime tend to be overwhelmingly in the 20-30 age group (82%), while only 5% are over 35.]
- **Where are they?** Often local to the service - 49% in Bradford, for example, where a further 12% came from elsewhere in Yorkshire, 28% from elsewhere in the UK, and 11% from abroad. As with the other data there may be significant differences between universities. [The largest regional groups for Graduate Questiontime are from London and the Home Counties (23%) and West Midlands (14%).]
- **What do they ask?** Enquiries were differently described from place to place but topics such as *Further Study*, *Job Search and Application*, *How to explore your options*, *Career Choice*, and *Career Change*, appear regularly. [Graduate Questiontime also gets asked about *Further Study* (22%), *Job Hunting* (18%), *What can I do with my degree?* (12%) and about *Career Change* (11%).]
- **When do they ask it?** Most local enquiries came in the first half of the academic year. Some services recorded a second smaller peak in the summer. [Graduate Questiontime gets most of its emails from July to January.] In Bradford 68% of emails arrived in normal office hours (9-5) and only 9.5 % at weekends, whereas anecdotal evidence elsewhere suggested the reverse.
- **How long does it take?** From a few minutes to an hour and a half, depending on the nature and specificity of the enquiry, the experience of the adviser, and the availability of supporting resources (e.g. a database of standard replies, or parts of replies, to the simpler and more common requests, which can be cut and pasted). By all accounts an email service neither greatly increases nor greatly decreases the overall time required to give guidance.

But is it guidance? or only information and advice?

This depends on

- definitions and models of guidance used
- design, framework and management of the system
- processes of guidance
- skill and experience of the staff involved
- ethics, security and standards

Defining guidance

- Official and governmental definitions of guidance appear to distinguish between Information, Advice and Guidance (or Enhanced Services). Even on such a scale the named categories of enquiry dealt with in the email services in these projects frequently match what is officially labelled “guidance” (<Career Changes>, <Career Choice>, <Career Implications of Module Choice>, <Occupational Choice> etc.).
- *Outcomes of guidance* such as those defined by the FIRST model (Bedford, 1982) can also be identified. In a content analysis of a 5% sample of emails from the local projects, 53% were about tactics, 44% about information, 29% about scope, 15% about achieving focus, and 5% about realism.

Decision-making was discussed in 7% of cases. [For comparison, clients giving feedback to the national service indicated that they had achieved focus (42%), tactical ability (41%), awareness of the scope of opportunities (36%), realism (34%) and information (33%).]

Designing, framing and managing the system

- Is the email service simply an additional offering, an alternative to existing services, or part of a sequence of services and activities involving other interventions? An email access point used simply to filter enquiries, diverting most of them towards face-to-face guidance, for example, is a different resource from one used to deal with the enquiry entirely on-line.
- The way the service is framed, presented and integrated within the progressive use of other resources may help to decide if it is indeed “guidance” or not. Management decisions about team versus personalised approaches will also have a bearing on this. The latter may make it easier to close the gap with face-to-face guidance services.

The processes of guidance

- Advisers who felt that email services could only offer information and advice, not “guidance”, appeared to do so because they experienced the services as lacking dialogue and interactivity, especially where a strict team approach was used, as well as the obvious reduction in non-verbal communication.
- To some extent this was a self-fulfilling prophecy: some advisers funnelled users to off-line services if there was any sense that they might need “guidance” in the sense of help to clarify or identify the issues, or some sort of dialogue with the adviser over a longer period. This is a defensible professional judgement but not the only possible solution, especially if enquirers have no obvious access to a face-to-face service.
- However, as other examples showed, at both local and national level, enquiries, even within a system run along team and impersonal lines, could develop into dialogue with an exchange of emails between adviser(s) and client leading to development for both the enquiry and the enquirer.
- Experiences in related therapeutic and counselling e-services suggest that emotional issues far beyond those released by the average guidance intervention, can be handled effectively (including suicide counselling by the Samaritans). “Guidance” is not intrinsically more demanding in this respect.

Adviser skills and experience

- In the new context(s) this involves not only developing keyboard skills and other relevant technical competencies, but also learning to analyse a text, and use the written word to convey warmth and build rapport and dialogue.
- An *Advisers’ Checklist* has been drawn up to support further professional development. The acquisition of such skills and related experience has a bearing on how much guidance can be delivered by email (Offer, 2004a).
- The practice of e-guidance also provides potentially useful contexts for the supervision of trainee advisers and for learning by peer review, given the availability of so much recorded material.

Ethics, security and standards

- All staff should be aware of the issues of security and confidentiality raised by email services, and check their understanding of existing professional and legal codes and standards, including the Data Protection Act.
- The national service for graduates has been the first of its kind to achieve accreditation against Matrix Quality standards for guidance services. It is not expected to be the last.

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