Review of the Advisory Services Model

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A report of research carried out by IFF Research Ltd on behalf of the Department for Work and Pensions
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## Glossary of terms

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<tr>
<td>AAT</td>
<td>Adviser Achievement Tool</td>
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<td>ASM</td>
<td>Advisory Services Manager</td>
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<td>BOC</td>
<td>Better Off Calculation</td>
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<td>CAT</td>
<td>Customer Assessment Tool</td>
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<td>CETL</td>
<td>Customer Engagement Team Leader</td>
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<td>DASO</td>
<td>Diary/Administrative Support Officer</td>
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<td>DEA</td>
<td>Disability Employment Adviser</td>
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<td>DM</td>
<td>District Manager</td>
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<td>EOT</td>
<td>Employment Outcome Target</td>
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<td>FTA</td>
<td>Fail to Attend (rate)</td>
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<td>IB</td>
<td>Incapacity Benefit</td>
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<td>Income Support</td>
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<td>KMI</td>
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<td>LDR</td>
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<td>LMI</td>
<td>Labour Market Invention</td>
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<td>Lone parent</td>
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<td>New Deal 25+</td>
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<td>Abbreviation</td>
<td>Full Form</td>
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<td>NDYP</td>
<td>New Deal Young People</td>
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<td>OM</td>
<td>Operations Manager (job title now changed to Customer Service Operations Manager)</td>
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<td>PA</td>
<td>Personal Adviser</td>
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<td>PAM</td>
<td>Personal Adviser Manager</td>
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<td>QAF</td>
<td>Quality Assurance Framework</td>
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<td>SAT</td>
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<td>SIBPA/IBPA</td>
<td>(Specialist) Incapacity Benefit Personal Adviser</td>
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<td>SOM</td>
<td>Standard Operating Model</td>
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<td>VSM</td>
<td>Vacancy Services Manager</td>
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<td>Work Focused Interview</td>
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Summary

Introduction

A new Model for the delivery of advisory services (the Advisory Services Model) has been implemented in jobcentres nationally. The national rollout began in April 2006 and was completed in September 2006¹.

The new Model was introduced to provide a standard structure for management within jobcentres in order to improve the performance and productivity of Personal Advisers (PAs) and to ensure the consistent delivery of mandatory Welfare to Work interventions. It represents a significant investment in managerial and administrative support for PAs and aims to help them to meet productivity and performance targets.

The key changes in the structure of the advisory services teams in jobcentres have been as follows:

• the jobcentres are now managed by two band D managers; a Jobcentre Manager, (JCM) who is accountable for delivery of individual and employer customer service, Jobseeker’s Allowance (JSA) conditionality and customer compliance and an Advisory Services Manager (ASM) responsible for welfare to work advisory services. Some JCMs and ASMs will cover more than one office (typically up to three);

• PAs will focus purely on advisory work and any non-advisory work will be undertaken by other roles;

• Diary/Administrative Support Officers (DASOs) have been introduced to handle non-advisory work for PAs, including booking appointments and making reminder calls to clients to help reduce Fail to Attend (FTA) rates, doing administrative work and taking calls for PAs whilst they are conducting interviews;

• a new post of Customer Engagement Team Leader (CETL) has been established to provide technical support to the PA team and the ASM. They will also manage the Diary/Administrative Support staff.

¹ In some offices recruitment for all the job roles was not completed until March 2007.
IFF Research Ltd was commissioned to undertake qualitative research amongst jobcentre staff to examine how they felt the new Advisory Services Model was working and their perceptions of how it has affected the quality of service delivery, performance and staff experience. However, it should be borne in mind that not all the issues raised in this research were directly due to the Model and that staff sometimes had difficulty differentiating between the different initiatives and changes.

The research comprised eight case studies with jobcentres across England, Scotland and Wales. Jobcentres were chosen to represent: Spearhead and non-Spearhead offices; multi-site and single site offices; a range of labour markets; urban and rural locations.

Within each jobcentre, interviews were conducted with District Managers (DMs), Operations Managers (OMs), ASMs, JCMs, CETLs, PAs and DASOs.

In total, 90 interviews were conducted. Most interviews were conducted as face-to-face depth interviews. Fieldwork took place between 29 January and 23 February 2007.

Findings

Overall, staff views of the introduction and impact of the new Model were mixed. There were felt to be some benefits of implementing the new Model but also areas where it was not working effectively.

Implementation

Views of the way the new Model was implemented were mixed. Senior management were the most positive, but felt the process was too rushed and meant that there was insufficient time to recruit staff, get staff buy-in and complete the basic training for the new roles. (Most staff in new roles had not received all the required training; indeed it appeared that some of this training was not yet available when the Model was implemented.) OMs also felt that they were unable to support the ASM and JCMs as much as they would have liked with the implementation. Most less senior staff (CETLs, PAs and DASOs) felt communication of the new Model had been poor, with the exception of one or two Spearhead sites. This was reflected by the fact that less senior staff were unclear about the drivers and reasons for change.

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2 Spearhead offices were the first to implement the new Model. They started to implement the Model from April 2006. Non-Spearhead sites implemented the new Model in August-September 2006.

3 Multi-site and single site offices – multi-site offices being those where the JCM and ASM covered more than one office (typically up to three).

4 Operations Manager job title has now changed to Customer Service Operations Manager.
The Model was not felt to be working as well in multi-site offices. Management resources were felt to be too stretched, as additional reporting, travel and staff management issues added to what was already felt to be a very full workload for those in single sites. As a result, they felt they were not able to manage all aspects of their staff and site responsibilities as well as they would have liked and it also made it more difficult to build and maintain a close working relationship with the other band D manager. Inadequate IT systems compounded the problems because remote working was not possible.

**Views of job roles and working relationships**

The splitting of the management of the jobcentre between two band D managers and introduction of the ASM role was seen by staff and management as the most successful element of the Model as both the ASM and JCM managers have been able to provide higher levels of support for their direct reports. This was the case across all case studies. However, a good working relationship between the two managers was felt to be crucial to the overall effectiveness of the jobcentre and a significant investment of time by the two managers and strong support from the OM were required to achieve this. There were some staffing issues and office management responsibilities which still needed to be clarified, including who should assume responsibility if the ASM and JCM were not in the office.

The new DASO and CETL roles were seen to have had some benefits. In particular, the CETL having assumed control over PAs diaries and seeing that the Adviser Achievement Tool (AAT) was being compiled was felt to be helping to increase the number of Work Focused Interviews (WFIs) being conducted. The DASOs have been answering PAs’ phones whilst they are conducting interviews and booking appointments.

However, the DASOs and CETLs were not seen to be taking on their full roles and responsibilities. This was due to a lack of time and training and for the CETL particularly, a lack of a clear job description and understanding of what their role entailed. DASOs were often being used to ‘cover’ other staff and office duties (notably front-of-house tasks) which meant they had insufficient time to undertake their own work. As a result, all staff recognised that PAs were not getting the intended levels of extra support under the new Model and were still undertaking most of their non-advisory tasks. DASOs and CETLs were also the least satisfied with their roles under the new Model.

PAs felt that the increase in the number of WFIs they were required to conduct, coupled with the fact that the DASOs were not relieving them of most of their non-advisory work to create extra ‘time’, was having a negative effect on the quality of service they felt they were providing for clients. This was particularly the case for PAs dealing with New Deal and Incapacity Benefit (IB) clients as they felt the extra interviews meant they had less flexibility to accommodate long appointments or appointments at short notice that their clients might require. For New Deal PAs it also impacted on the time available for resolving customer queries and matching
clients with jobs. This was having a negative impact on their job satisfaction and was compounded by what they perceived to be the loss of control over their own workloads, with appointments being booked and monitored by the CETL. The Model was also not felt to have improved PAs ability to see the clients they were specifically trained to assist. Indeed, some PAs felt things had deteriorated in this regard as they were required to cover a broader range of clients to help meet productivity targets or cover for staff shortages.

As noted above, many staff undertaking new roles felt they had not received all the required training yet for their new position. Most staff also felt they would benefit from additional training in fulfilling their roles, in particular technical training such as on eligibility rules and markers.

There were some grade issues. PAs felt uncomfortable with the CETL role being the same grade. This was the case under the previous model and PAs felt the new CETL role had not addressed this issue. DASOs felt uncomfortable with doing what they perceived as some band C (PA) tasks. These, together with the lack of clarity over the DASO and CETL roles, caused some tensions within the advisory services teams, although generally working relationships were good.

Working relationships within the advisory team were generally felt to be good. However, working relationships between the advisory services teams and other jobcentre staff were felt to have deteriorated, particularly amongst less senior advisory service staff. There was a feeling that they were now two separate teams in the office and less of a feeling of working together to achieve one goal. This was due in part to lack of clarity over the management of some aspects of staffing between the ASM and JCM and also concerns that customers were being told different things by the two teams and not receiving consistent messages.

**Impact of Model on performance and productivity**

The number of WFIs being conducted was felt to have increased. Adviser process compliance was also felt to be improving, with WFIs being increasingly conducted to time, as a result of the increased focus and checks on these targets which the new Model was facilitating.

The Model was also seen to be supporting the conduct of the AAT and the new Quality Assurance Framework (QAF) which were designed to help improve productivity and quality. In most case study areas these were being carried out and, where used in an effective manner, were felt to be helping PAs focus their activities and identify areas for further improvement and development.

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5 PAs and Personal Adviser Managers (PAMs) were the same grade.

6 It needs to be recognised that the only member of the JCM team that was covered by the research was the JCM, so we have no counterpoint to the views of the advisory team staff.
The new Model was not felt to have led to any improvement in the proportion of customers failing to attend interviews (FTA rates). Not all managers were convinced of the efficacy of pre-calls, so this aspect of the DASO's role was not seen as a priority, and calls were not being made. However, some offices were overbooking to counter the impact of FTAs.

Staff were generally unable to comment as to whether the Model has helped adaptation to the Job Outcome Target (JOT).

More senior staff were generally more positive about the potential impact of the Model on productivity and performance. Whilst they recognised that there had been little impact on hard measures in the figures recorded to date, they were confident that this would feed through in time, reflecting that the increased resources and checks that had been put into advisory services or were being facilitated by the new Model, could only serve to drive up productivity and quality. Less senior staff felt that the greater number of interviews being carried out was detracting from the quality of advice and flexibility of the service they were able to offer.

Some staff also commented that whilst the Model might potentially improve service quality, they were at the same time suffering staff cuts which would have mitigated any positive effects.

Conclusions

In conclusion, staff views about the new Model were mixed. They felt that it has had some positive benefits on productivity and the management of the advisory team, but there were significant issues that needed to be addressed if the Model was to achieve its full potential. The findings were broadly consistent across the eight case studies and suggest that the national Model can work, with the possible exception of multi-site offices where management resources were too stretched.

Key lessons

The research has highlighted a number of key lessons about the Model and its implementation. These are briefly outlined below:

- in terms of the implementation of the new Model, the key lesson for introducing other major structural or procedural changes is not to do this too rapidly and ensure people issues are addressed (e.g. through good, face-to-face communication and receiving necessary training);
- management resources in multi-site offices need to be reviewed;
- job roles (particularly CETL and DASO) need to be clarified and sufficient time made available to carry them out effectively. Consideration should be given to whether the CETL should be a full-time role;
- training needs to be in place for all staff to ensure they can carry out their roles effectively;
• resourcing issues, whilst not directly relevant to the Model, were impacting on its success. They, therefore, need to be addressed, particularly but not exclusively at multi-sites. This includes space, desks, telephony and the accessibility of Management Information (MI) and PA diaries across multi-sites;

• ensure ASMs comply with the guidance to undertake pre-calls work to reduce FTAs;

• continued support is required from the OM to build and maintain good relationships between the ASM and JCM and to ensure the teams have shared goals. This will ensure the ethos of ‘one jobcentre’ is maintained and that customers receive consistent messages from members of different teams.
1 Introduction

1.1 Background

A new Model for the delivery of advisory services (the Advisory Services Model) has been implemented in jobcentres nationally. The national rollout began in April 2006 and was completed in September 2006, although in some offices, recruitment for all job roles was not completed until March 2007. The new Model represents a significant investment in managerial and administrative support for PAs and aims to help them to meet productivity and performance targets.

Prior to the introduction of the new Advisory Services Model, jobcentres were managed by one band D Business Manager who was responsible for the line management of all jobcentre staff. PAs were managed by band C PAMs. A change in structure was sought because it was recognised that the traditional Business Manager role was becoming too broad to drive improvements in customer service and performance. Staff feedback showed that PAMs were confused about where line management responsibility for PAs lay between themselves and Business Managers, particularly given that the PAMs were the same grade as PAs. Additionally, in instances where band D Adviser Managers had been introduced, feedback suggested that they delivered better performance and tighter management than the PAMs.

The new Model was introduced to provide a standard structure for management within jobcentres in order to improve the performance and productivity of PAs and to ensure the consistent delivery of mandatory Welfare to Work interventions. The new structure was also intended to support the deployment of the new QAF, AATs and Skills Assessment and improve Learning and Development Routeways for the advisory team.

The new structure is illustrated in Figure 1.1. The key changes in the structure have been as follows:
- the jobcentres are now managed by two band D managers; a JCM who is accountable for delivery of individual and employer customer service, JSA conditionality and customer compliance and an ASM responsible for Welfare to Work advisory services. Some JCMs and ASMs will cover more than one office (typically up to three);

- PAs will focus purely on advisory work and any non-advisory work will be undertaken by other roles;

- DASOs have been introduced to handle non-advisory work for PAs, including booking appointments and making reminder calls to clients to help reduce FTA rates, administrative work and taking calls for PAs whilst they are conducting interviews;

- a new post of CETL has been established to provide technical support to the PA team and the ASM. They will also manage the Diary/Administrative Support staff.

**Figure 1.1 New Advisory Services Model**
1.2 Research objectives

IFF Research Ltd was commissioned to undertake qualitative research amongst jobcentre staff to examine how they felt the new Advisory Services Model was working and their perceptions of how it has affected the quality of service delivery, performance and staff experience. Specific objectives included:

• gathering evidence on the impact of the new Model on PA’s productivity and performance;
• assessing how well the new Model has improved the management and support of PAs to enable them to provide an effective and high quality service;
• exploring the impact of local factors or issues on the delivery of the Model;
• exploring the impact of the Model on the ability of advisers to utilise their skills and work as part of the advisory team;
• exploring staff satisfaction with the new job roles and working relationships.

It was originally hoped that management information on productivity and performance would be available to support this review, but this is not available currently.

1.3 Methodology

A qualitative research methodology was adopted comprising eight case studies with jobcentres across England, Scotland and Wales. Jobcentres were chosen to represent:

• Spearhead and non-Spearhead offices – Spearhead offices were the first to implement the new Model starting from April 2006. Non-Spearhead sites implemented the new Model in August-September 2006;
• multi-site and single site offices – multi-site offices being those where the JCM and ASM covered more than one office (typically up to three);
• a range of labour markets;
• urban and rural locations.

Details of the eight jobcentres covered are provided in Appendix A.

Within each jobcentre, interviews were conducted with:

• the DM and OMs7;
• the ASM and JCM;
• CETLs and PAs;
• DASOs.

7 Operations Manager job title has now changed to Customer Service Operations Manager.
In total, 90 interviews were conducted across the eight jobcentres. Most interviews were conducted as face-to-face depth interviews. Some more senior staff (DMs and OMs) were interviewed by telephone for their convenience. Face-to-face interviews lasted 30-40 minutes on average, while telephone interviews were a little shorter, at around 20 minutes. Some interviews with less senior staff (CETLs, PAs and DASOs) were conducted in pairs or mini-groups where this was practicable.

A range of different PAs were interviewed, including JSA Advisers, New Deal Advisers, Incapacity Benefit and Lone Parent Advisers, and Disability Employment Advisers.

Fieldwork took place between 29 January and 23 February 2007. A breakdown of achieved interviews is provided in Appendix A. Copies of the topic guides used in the discussions are also appended.

This is a report based on qualitative research. Qualitative research is intended to add depth, insight and understanding to attitudes and perceptions. No quantitative data was examined as part of the research, so all references to hard data are based purely on the views and perceptions of staff and managers.

In reading this research report it should be borne in mind that not all the issues raised in this research were directly due to the Model and that staff sometimes had difficulty differentiating between the different initiatives and changes.

1.4 Report structure

The remainder of this report is structured as follows:

- Chapter 2 briefly discusses staff experiences of the implementation of the new Model;
- Chapter 3 examines staff views and understanding of their role and whether they felt they have the training and resources to undertake their work;
- Chapter 4 explores how relationships are working both within the Advisory Services team and with the rest of the jobcentre staff;
- Chapter 5 examines staff views of the impact of the new Model on performance and productivity;
- Chapter 6 draws together the main findings and lessons emerging from this study.
2 Implementation

All staff were asked about their experiences of the implementation of the Model. Senior managers were asked about the major challenges they had faced in implementing the Model and how they were addressed. Band D managers were asked about their experiences of implementing the Model at a local level and what lessons had been learnt through their experiences. Less senior staff (CETLs, PAs and DASOs) were asked about how the introduction of the new Model was communicated to them and whether they understood the reasons for the changes and what they were aiming to achieve.

2.1 Senior management views on implementation

When asked about their experiences of implementation, those who were more senior tended to be the most positive about how implementation had gone overall.

At a jobcentre level, managers in Spearhead offices were more likely to be positive than those with non-Spearhead sites. This appeared to be due to the Model having had more time to bed down, and some problems having been sorted out in the process.

‘We should wait [before evaluating], when we put a change in, we should implement it and let it run and see how it is working. It is early days. Just before Christmas I would have said lots of things, now they are improving. Be patient, give it time.’

JCM

Senior managers felt implementation was too rushed, but otherwise were more positive than less senior staff. This rush to implement left them with insufficient time to recruit staff or to get a buy-in from their staff and management for the new Model prior to implementation. It also left them unable to support their band D staff as much as they would have liked with site level implementation.

‘It’s not that it was not working well, it was more to do with the lack of time to adequately prepare people.’

DM
'The scales are very heavily weighed towards the positive but the point I am making is that we could have made a better job of those positives had we conducted our implementation in a much more considered constructive way particularly not just setting dates for our implementation where we adopt a one size fits all Model but instead project planning in the real term – have the plan drive the timescales rather than the timescales driving the plan.'

DM

When specifically asked about the major challenges they were faced with during implementation, senior managers talked, in the main, about issues with recruitment, training and staffing.

2.1.1 Recruitment

In terms of recruitment, some commented that it was difficult to get the right people into the right roles because of HR policy. Managers said they were obliged to prioritise the grade over the specific job role when recruiting so, in some cases, had to recruit candidates who were of the required grade but did not have the technical knowledge for the role. In other areas it was the sheer number of managerial vacancies to fill – 80 in one area – which caused a problem in terms of the quality of available candidates. Further, staff reported that there had been a significant amount of job changes since staff were first appointed which supports this view. These issues were felt to have added to the time taken to bed down the Model.

‘We have put people in post who haven’t really got the skills.’

OM

‘I would like the CETL role to be that of deputy ASM, as they are crucial to the process of helping support the ASM to get processes in place. Then we could have selected stronger candidates. However, all the best candidates for the CETL roles went to be ASMs, either in their own jobcentre or in other jobcentres. We have suffered as a district because of this.’

OM

2.1.2 Training

Training was not always available for staff who were taking on new job roles or whose job roles were changing with the Model. This led to delays in implementation and was still impacting on the bedding-in process since some staff in new roles were still awaiting some of their training when interviewed and there were still outstanding needs as discussed further in Section 3.5.

2.1.3 Staffing

There were some difficulties with establishing a good working relationship between the ASM and JCM; the focus was on the new ASM role so some JCMs
felt left out. This relationship, crucial to the success of the Model, was left very much dependent on how they got on as people.

This was exacerbated in multi-site offices as the band D managers were not always at the same site. It was particularly noted by senior managers in non-Spearhead sites, which might indicate further that this relationship takes time to fully develop.

Other staffing issues mentioned were recruiting staff for sites where recruitment was already difficult, and issues specific to multi-sites in terms of staff numbers and locations. This issue is discussed in more detail in Section 2.2.

### 2.2 Multi-site issues

Senior managers for multi-sites commented that the organisation of band D managers to cover these sites had been the biggest issue for them. Specifically, there had been a lack of consensus over who should be in charge of the office when the JCM was not there. This might be the ASM who in theory would be in the office when the JCM was not, or a deputy JCM or CETL. This issue appeared to be still unresolved at some sites.

Band D managers were concerned that their workload increased when managing more than one site. They had multiple reports to compile for each site, there was additional travel time taken out of their schedule, which could be significant in rural areas, and they had to conduct multiple briefings of staff. In one case study, the JCM had previously been managing all staff in one office and was now managing half of the staff in two offices, which they described as frustrating, time-consuming and expensive.

There were also issues over the location of the CETL, who needed to be on the same site as both the ASM and PAs in order to fully support them. The fact that they did not have remote access to computer systems only exacerbated these issues as they were unable to modify diaries and undertake other administrative functions from a remote site. In small offices with a lot of part-time staff there were a lot of diary changes to cope with, which put additional pressure on DASOs. PAs also required a manager to be physically present in order to sign off paperwork. In all, managers and staff in multi-sites felt that staffing was spread too thin to the risk of health and safety.

*‘We are waiting for a health and safety disaster…I do worry what might happen if a disaster happens at a site and there is no manager there. What will happen? People will run around because there is no lead – no manager. It is a real concern, not an overreaction because that is what staff had said to me and to not pass it on would be a lack of integrity on my part.’*

DM
2.3 Staff views on communication of the Model

When asked about how well the Model had been communicated to them, most staff felt that communication had been poor.

Where staff were positive about communication and had a reasonable understanding of implementation, they had had a specific face-to-face meeting where the Model had been explained. Some staff reported that it was mentioned at their weekly briefings that new staff roles were being put in place, so they were aware that there would be changes impacting on them, but they lacked a more global understanding of the Model as a whole.

'It was much better to be told it rather than just given an email and told you have got to read this because you don’t get the time, but if somebody’s standing there delivering that message then you reach more people.’

PA

'We had a few sessions relating to the Model, but it was all too basic really…basically they just said it was going to happen and that’s it.’

PA

At some sites, some staff demonstrated large gaps in awareness. For example, in one case study, a CETL commented that they had only heard of the Model when the researcher came, in another, a DASO was not aware that they were indeed a DASO.

Where it was done worst, no staff at band C or below knew they had moved to a new Model. They were aware that they had new targets and when questioned about the Model, assumed that these must be connected.

Staff at Spearhead sites were more likely to be positive about the communication than those at non-Spearhead sites. However, not all staff at Spearhead sites were positive, as the following quote from a PA in a Spearhead site attests.

'We had no consultation at all – we didn’t even know why diaries were changed…the only thing we were told was that there would be one adviser manager across three offices…she didn’t even have the common courtesy to come down to the office and see us.’

PA

Those staff who were being moved into the new roles of DASO or CETL, so were most affected by the implementation of the Model, wanted earlier notice of role changes and clearer job descriptions to enable them to better prepare for the change. They would also have liked their colleagues to have had a better awareness of their new roles to foster greater understanding in the team. As discussed more fully in Section 3.3, the understanding of the new CETL and DASO roles was generally poor.
'We pulled the job role of the CETL off the internet to see what he was supposed to be doing.'

PA

'They just think you are sitting there shuffling bits of paper. They don’t know what is involved. So I think it could have been better communicated.'

DASO

2.4 Understanding of drivers and reasons for change

Staff were asked if they were given enough information about the reasons for, and implications of, the changes that were being made. Managers, whilst not specifically asked this question, demonstrated their understanding when asked for their overall views of the Model.

Senior staff were more aware than less senior staff of the drivers and reasons for change. They believed the reasons for change were to provide better management and support for PAs in order to improve their productivity.

Drivers and reasons for change were generally unclear for less senior staff. Some suggested it might be to improve the quality of PA work, whilst others felt the emphasis was moving away from making a difference to individuals and towards meeting targets on numbers seen. In only one case study (Spearhead site) did less senior staff feel aware of the reasons for introducing the Model.

‘I understood the reasons behind it. They had to get a grip on productivity, and they thought a dedicated manager would help…no, no one told us that, I just guessed those were the reasons.’

PA

‘It was very well communicated – I didn’t necessarily agree but understood what they were trying to do.’

PA

Staff expressed the view that the culture within Jobcentre Plus was one of change, so staff had become used to accepting such changes unquestioningly, since they perceived change to be the norm. However, the lack of understanding of the drivers and reasons for change seemed to have heightened feelings of uncertainty about other possible changes in job roles at some sites.

‘Everyone is a bit jaded having been through so many changes and chops around, and no matter how many changes you have you always feel as if you are dispensable regardless of how much work you have put in…Things are changed whether you think it is good or bad, it is brought in and you have to deal with it, this is the way it is and that is the way it is going to be and there will always be more.’

PA
3 Views of job roles

All staff and managers, with the exception of the DM, were asked how they felt about their own role under the new Advisory Service Model. They were asked what was good and bad, whether they understood what was expected of them and if they had any skills gaps or training needs. Any other resourcing issues which impacted on their ability to do their job were also discussed. For band D managers and below, we also collected information on job roles prior to implementation of the Model.

The views of each group of staff are discussed in turn below. Staff views about the effectiveness of splitting the management of the jobcentre between two band D managers (ASM and JCM) and the two new roles of CETL and DASO are also discussed.

Overall, the more senior the staff, the more positive they were about their role. The ASMs were the most satisfied with their new role, the CETLs and DASOs were least content. The perceived increase in pressures and workloads were a concern for all staff.

3.1 Operations Manager

The OM role was described as hands-off and strategic. The general feeling was that, whilst this was the case to an extent prior to the Model, it had become more so since implementation.

OMs were clear on what was expected of them in the role. However, they did have concerns about having twice as many managers to manage and some felt unable to give as much support and feedback as they would like to, particularly for non-Spearhead sites where arguably more support was still needed to bed down the new Model.

‘I don’t have time to feedback to my managers, it has to be ad hoc.’

OM
‘I feel I do not give enough support to managers, I do not feel I have done anything like enough. There should be a lot of coaching involvement from me.’

OM

There was a lack of control over some aspects of manager workloads which they found frustrating. This was because Corporate Services could demand work directly from band Ds, which could overload them whilst leaving the OM powerless to do anything about it. In one case study, band Ds also commented that these requests from Corporate Services were not always directed to the most appropriate manager or, in some cases, requested of both, which could potentially lead to unnecessary duplication of effort.

As mentioned in Section 2.1.1, OMs complained about restrictive HR policy regarding appointments of staff to posts.

3.2 Advisory Services Manager and Jobcentre Manager

3.2.1 Advisory Services Manager

Most ASMs came to the role from district office roles. One had been a JCM and two were promoted from PAM into the role.

Out of all the job roles, ASMs were most likely to say they were happy in their role. They were generally very positive about their role and understood what was required of them. They felt that since introducing the role there was better support for PAs, which was driving up quality through all the additional checks that now took place.

‘I personally think it is brilliant. I enjoy my job. I don’t have enough time to do it but I think that is one of those things…It really focuses down on the advisers…previously they were left to it and that is not a good thing because the ones that are good get on with it but the ones that are not so good get away without doing much.’

ASM

However, ASMs felt there was still too little time to do everything, particularly in multi-sites where additional reporting, travel and staff management issues added to their workload. They thought that a solution would be to have a deputy, or more support from the CETL. Case studies varied in the extent to which CETLs were already being used as a deputy ASM, but most were not.

There was additional time necessary to communicate and negotiate with the JCM to ensure good team working. They felt this would have been less of a burden if there were greater clarity in the division of responsibilities between the two band D roles. Particular issues had been around staffing, including cover for absence and vacancies.
3.2.2 Jobcentre Manager

Most JCMs had been JCMs prior to the implementation of the Model. But whilst their job title had not changed, they were aware that their role was now different. A few JCMs had previously been in another management role at a Jobcentre Plus office, such as a Business Manager or PAM. One had not previously worked in a jobcentre office.

JCMs were generally positive overall about their new role. They understood their role and those who had been JCMs prior to the Model felt better able to support their staff than before its introduction.

‘The satisfaction from the supporting your staff point of view is excellent... my staff feel I’m very visible, my office is on the ground floor with all the staff, they know that they can come in and see me at any point...So I’ve had feedback that they prefer it and so do I.’

JCM

They shared with ASMs a frustration at being short on time to do the job, particularly in multi-site offices. They agreed that working with the ASM was time-consuming because of the need to spend time communicating effectively.

‘It took me two weeks to get the holiday rota done, and it would have taken me 20 minutes before.’

JCM

The balance of work between the ASM and JCM was not seen as fair by some, because the JCM role carries additional office level responsibilities such as health and safety, floor issues and enquiries, in addition to their line management responsibilities.

‘The JCM role is much bigger and more difficult because it covers a much wider range of issues. I have the VSM, FAs and interventions teams, floor walking and the site manager role.’

JCM

The new site health and safety responsibility that JCMs have been assigned was a particular concern for some, who felt they lacked the training to enable them to safely fulfil this important responsibility.

3.2.3 Effectiveness of Advisory Services Manager/Jobcentre Manager split

Managers felt that splitting the band D role into the ASM and JCM roles was an improvement on the situation prior to the Model. There was now a better focus on productivity and processes and better support for staff, which staff also agreed with although to a lesser extent than senior staff.

‘The focus on performance has become easier since the split, because the ASM can now focus on that area.’

JCM
All staff felt that the JCM/ASM relationship was crucial to the success of the Model as a whole. More senior staff also commented that it often needed the support of the OM in order to ensure they worked together most effectively. Examples of where the JCM/ASM relationship had not been effectively established yet included one case study where the JCM was unwelcoming to the new ASM because the post had been externally advertised, setting up resentment even before the new ASM arrived. In another, the ASM and JCM had only relatively recently taken up their posts (this being an example of where there had been some switching of senior staff after implementation) and so had only just identified the major issues and were working together to resolve them. One of the changes they had already introduced was having joint daily ‘keeping in touch’ meetings for all staff, so they were better informed about how holidays and sickness and other day-to-day staffing issues were being covered.

‘You really need to have an excellent relationship with your ASM. If you don’t have that relationship there then I think the division of the two roles would have a horrendous effect on performance and morale.’

JCM

Multi-sites presented additional challenges for the success of this relationship since JCMs and ASMs might rarely see each other. Some managers felt the split roles worked better in smaller single sites than larger ones or multi-sites, where the teams could have regular contact and work together more effectively.

As already noted, there was a need to clarify roles and responsibilities of the different band D posts, particularly in relation to staffing issues and general management issues. The issues of who was ‘in charge’ when one or both the managers were absent and staff leave and cover were the most frequently cited examples of where clarification was felt to be required. Junior staff particularly felt that if managers took a different line with staff who shared an office on issues such as leave and cover it could contribute to an ‘us and them’ culture between the teams.

3.3 Customer Engagement Team Leader and Diary/Administrative Support Officer

The CETLs and DASOs were least likely to be content with their roles. The key reasons for this included lack of clarity of their remit, lack of understanding by other staff of their roles, lack of time to carry them out and, in some cases, lack of choice in selecting the role for themselves.

3.3.1 Customer Engagement Team Leader

Most CETLS came to the role from roles they perceived as senior to PAs, such as PAM or Deputy JCM.
Most did not fully understand their role. It was not communicated well to them or to others and the remit was not clear from their job description. This lack of clarity was compounded by doing PA duties alongside the part-time CETL role. Some also felt they were pulled into duties that were outside their perceived remit.

‘I think because I have no clear idea of what I’m doing...there doesn’t seem to be anything anywhere that actually lays down what you are supposed to be doing.’

CETL

They also felt that they lacked the time or skills to do some of the duties that they should be doing, notably in managing the DASOs and supporting the DASO with administration, pre-calls and covering phones. For example, as discussed in Section 3.3.3, as many lacked sufficient knowledge of eligibility rules and markers they were unable to fully support the DASOs. Most who were part-time felt it should be a full-time role since they did not feel they could realistically cover more than half of their remit in the time allocated to it. But those who were full-time also felt unable to complete their duties in the time available. One who was full-time felt they were pulled into DASO and PA roles some of the time.

‘The CETL role is only 0.5 and I feel it should be a full time role – I am not doing 90% of my job description. There is an insufficient DASO resource. All the time is taken ensuring diaries are full and back filling spaces to try and meet date of claim targets.’

CETL

CETLs raised the issue of lack of grade authority over PAs, who they said they were supposed to manage and coach. (This was the case under the previous model with PAs and PAMs being of the same grade, but was not mentioned.) Where grade authority had not been a problem at their office this was felt to be because they came from a more senior role and so had the ‘authority’ but they felt it would be more of a problem for those CETLs who were previously a PA. Indeed, in the one or two cases where the CETL had been ‘promoted’, lack of authority was an issue. There was one report from an ASM of CETLs being unwilling to undertake a team leader role because there was no financial reward for doing so.

‘I’m band C like the advisers, which could be a problem when it comes to QAF checks. Luckily, they remember me in a managerial role so it isn’t a problem. I think for other CETLs it might be a problem.’

CETL

‘They say if you are doing your job right they’ll hate you – well they hate me so I must be doing something right.’

CETL

CETLs were clear that AATs and quality checks were part of their role but there was evidence of some duplicating of the work of the ASM on this. In one case
these tasks were duplicated, in others shared and in others the ASM did all of it because the CETL did not have time.

### 3.3.2 Diary/Administrative Support Officer

DASOs came to the post either from another administration role within Jobcentre Plus, from contact centres or were previously FAs. It was of note that some felt pushed into the role of DASO rather than actively choosing it, having been assigned to the role by their managers.

The DASOs, like the CETLs, tended to feel they lacked the time to do all the duties they were supposed to. Most were taking PA calls but not doing much PA administration or pre-calls. They also tended to get involved in duties outside their remit – they were the first in line if cover was needed elsewhere for front-of-house activities such as floor-walking or staffing the ‘phones or for covering Financial Assessor (FA) sickness. As with CETLs, they felt that others were not always clear about what the DASO role was.

‘They just seem to make a new role and bolt bits on here and there. I think they are making it up as they go along.’

DASO

Some DASOs complained about being ‘tied to the phone’, particularly those who had been freer to move around the office in their previous role. Some also complained that the work was ‘bitty’ and so lacked job satisfaction. They described feeling like they were always helping someone else.

They also felt they had skills gaps which prevented them from taking on their full role. For example, one mentioned concern about phoning clients who have mental health problems because they have not been trained in how to talk to them. There were more widespread concerns about lack of technical knowledge in key areas such as eligibility rules and markers but others were unsure of where their skills gaps were, although they were sure they had some.

‘I feel I am floundering because I don’t know what skills I need to develop, I don’t know what I don’t know, no one has said these are the skills you need to develop.’

DASO

DASOs also felt uncomfortable doing what they perceived were some band C tasks (work which PAs had traditionally done), particularly in the absence of training and the additional time to carry them out, for example, covering for adviser sickness and collecting statistics.

‘They added things which are really managerial responsibilities, not things we should be doing at our level… I mean stats and stuff… I think that should be a managerial responsibility. I think that’s an executive role, and if they want me to do it they should be paying me more.’

DASO
3.3.3 Effectiveness of Customer Engagement Team Leader and Diary/Administrative Support Officer roles

Staff at all levels felt these roles were not yet delivering to their full potential. This was mainly because of a lack of a clear remit (particularly for the CETL role) – they didn’t know what their role was and neither did others, but also because of lack of time.

‘Can somebody tell me what the CETL role is? At the moment she is just doing what she has always done.’

PA

The most senior staff (i.e. the DMs and OMs who were not ‘on the ground’) were the more positive about the new roles but from the tenor of their comments it seemed that this reflected what they potentially could, rather than were, delivering.

‘I particularly like the creation of the administrative roles, because they support the advisers – this is a positive move.’

OM

‘I think the DASO role is working out and will get better with time.’

DM

Whilst CETLs and DASOs were unclear on how their role should be defined, some ASMs had taken the lead in more clearly focusing these roles, for example focusing the CETL on QAFs and focusing the DASO on the basic administration from the PAs or appointment booking and covering phones. Where this was done, the roles did appear to be more successful.

‘I had to disregard some of the guidance given regarding this role [CETL] because it really was a little woolly…it is still very much a role in development.’

ASM

Lack of training for CETLs and location issues in multi-sites led to some PAs resorting to booking their own diaries again in order to ensure they had sufficient correct appointments.

‘When he’s at another office he can’t get into the diaries – he can only look at them. I just sort out my own diary to be honest, even though we were told we were not to do that…we have to do them because we are the ones penalised if something goes wrong and that’s a big issue here.’

PA

The grading of CETLs at band C was a contributory issue to some problems as ASMs wanted a deputy and PAs resented being monitored by someone on the same grade. In addition, some CETLs resented being expected to ‘go back’ to
doing interviewing in the other half of their time when they had previously been an adviser manager.

‘I’m not happy about someone checking on me who is on the same grade.’

PA

Another contributory issue to problems with these roles (which needs to be recognised given the relative recency with which the Model has been implemented in most offices) was that the new ASM role was bedding in at the same time. Until the ASM was able to fully fulfil their role and was working well with the JCM, they were unable to give full support to the CETL and DASO to ensure these roles were working effectively.

‘The CETLs report to the ASMs, but the ASMs are also getting to get to grips with what they have to do and can’t offer enough support. So far we’ve been spending time getting the ASMs and JCMs in place, but now we will focus on the DASOs.’

OM

In light of staff views, DASOs appear to have had little real impact on PA workloads. Despite answering phones and making appointments, they were not really undertaking any of the administrative tasks of the PAs which were often felt to be the most time consuming element of their non-advisory duties. The evidence also suggests they have had no impact on FTAs as they have generally not been making pre-calls. Some said this was because they could not phone out because they were swamped with incoming phone calls. Others had not been instructed to prioritise this task, so it was not attempted. However, in the one case study where pre-calls were being made, PAs felt it did make a difference.

‘That role is not working at all…each office seems to have their own interpretation of the roles. If those roles were done as they are supposed to be done then the Model might work well…I think they are picking and choosing what they want to do…they see their role as booking interviews. They don’t see the other areas of support like doing the admin. Their role should involve that, things like DMA paperwork.’

PA

‘No, I’m not making the calls. I did do some a while ago but it was not working well – many customers have mobile phones – they do not have money on the phone to get messages. I felt it was a waste of time.’

DASO

As mentioned above, their time to do DASO duties was often impinged upon by having to cover other duties because of staff shortages, leaving no capacity to fulfil the role in its entirety. However, it could be inferred that this might have helped to mitigate the effects of staff shortages on other areas of jobcentre activity, which otherwise could have impacted negatively on the quality of service provided to clients.
'DASOs spend significant amounts of their time acting in back-fill customer facing duties – there hasn’t been a proper evaluation of what they have to do. They are very busy but their role is not very well defined.'

OM

3.4 Personal Advisers

Most PAs were in the role prior to the implementation of the Model and so did not feel the nature of their work had changed under the new Model, but some had changed specialism within the PA role.

Those PAs interviewed understood what was required of them but all had noticed a change in emphasis to a more target-driven way of working, which had a negative impact on their job satisfaction. However, none were sure if this was due to the Model or for other reasons such as the implementation of Jobcentre Plus.

‘I seem to be doing more and more work [as New Deal Adviser], but I don’t know if that’s because of the Model – it seems to have crept up gradually. Sometimes I just stand back and wonder where all the extra work has come from, and that could be because of the Model.’

PA

They perceived an increase in workload because they were doing more interviews a day. Full-time PAs in particular were unhappy with this. They felt under pressure and described themselves as exhausted at the end of the day. This reflected, in part at least, that DASOs have not been able to relieve them of (much of) their administrative work.

‘You feel guilty if you haven’t got a customer in front of you.’

PA

The increased number of interviews and emphasis on targets was, they felt, lowering the quality of advice they could give to clients and made them feel like they were on a ‘production line’. New Deal and IB PAs were particularly concerned about the extra interviewing because they felt it took away the additional flexibility required by their clients, who might need a particularly long appointment or to be fitted in at short notice.

‘I now feel I’m on a production line…we have six or more things to do in an interview, and now throughout the interview you are just thinking about whether or not you have ticked the relevant box or not. You no longer think about what the customer needs to know at all.’

PA
'There is a lot of pressure at the moment, they are a lot stricter with the targets, before the emphasis was more on the client and what was good for him, best for him, now they have to be doing this by this number of weeks, and that by that number of weeks, its not client-led.'

PA

Having more interviews to do also meant that PAs had less time to do other elements of their job such as resolving enquiries for clients and trying to match clients with jobs. This was a particular issue for New Deal PAs who felt they needed more time outside of interviews to conduct job searches and find training for their clients. Having more DASO resource would resolve this since PAs would have some administration time freed up.

‘They want us to interview from 9-5. Fine, but if you are New Deal you have to work with the customer and it generates work which you can’t do while they are sat with you. When am I supposed to do that? You need to research training provision for example.’

New Deal PA

Most PAs also did not like the loss of control of their diaries and as noted already, New Deal and IB PAs felt it impacted on their regular clients since it meant they could not fit them in when asked as they had been previously able to do. Some had gone so far as to take control of their diaries back. This seemed more prevalent in multi-sites.

‘If there are any changes to the diary, I do it. If the CETL does it the wrong type of appointments get put in, and he gives me [interviews] I have not got the skills to do. Makes appointments from 9am and we don’t open until 10am, due to his lack of training.’

PA

‘It really grinds my gears having to account for every minute of the day, they say we are managers, and yet they give us nothing to manage, I have been with the service 30 years with excellent appraisals, and now I have lost all loyalty, because they do not respect me.’

PA

As discussed in Section 3.3.3, they were not comfortable with the CETL, being the same grade, supervising their work.

Most had experienced an improvement in terms of having their phones answered by the DASO during interviews. The level of administrative support they had experienced from the DASO varied widely, with the majority saying there was no change in the level of administration they had to do. Disability Employment Adviser (DEAs) and IB advisers were most likely to have benefited from administrative support from the DASO, although there was no evidence of them being any happier in their role than other PAs.
'The phones used to ring all over the office and people would pick them up in interviews, or they wouldn’t pick them up and it would still be ringing whereas now it is in one central place and that has been a big impact.’

ASM

New claims PAs had a particular complaint that they were at the mercy of FAs completing financial assessments for clients, which impacted on them. In particular, if clients were late or the FA overran, with back to back interviews there was no room for slippage, so that they could not always cover everything they should do with the customer during their session.

‘I deal with New Claims, which means I have to work with the Financial Assessors who the customer has to go to first, and I’m not impressed with them because if a customer is late or if there is a problem with their paperwork, it runs into my time which with all these new initiatives is getting less and less anyway. When the management review my work, they don’t take into account problems created by the JCM team.’

PA, New claims

3.4.1 Whether the Model has improved management and support for PAs

One of the key aims of the new Model was to improve the management and support for PAs. This section examines the evidence from staff as to whether this is being achieved.

Overall, the view was that there was a need for more support for PAs, but there had been some improvements.

On the positive side, there was strong agreement from all staff, including the PAs that they were now better managed and supported because they had a dedicated manager – the ASM.

Managers and PAs also felt that QAFs (when done effectively) were helping to improve quality and identify skills gaps, although skills gaps were not always addressed sufficiently quickly due to lack of time. They were felt to be particularly useful for bringing on new PAs, although even experienced PAs felt they benefited from these sessions. ASMs generally struggled to keep up with the target number of QAFs every month, particularly those covering more than one site. There was also some evidence to suggest that not all gave it as much priority as perhaps they should. In most cases it was viewed as quality time with staff but one or two seemed to treat it as ‘another box which had to be ticked’, in one case delegating the task to their CETL. It could be suggested that there may, however, be scope for more flexibility, given the demands on the ASMs’ time and range of experience of the PAs, so that newer PAs or those assuming new responsibilities are still reviewed monthly but the most experienced PAs are reviewed slightly less frequently.
‘QAFs are helping to improve quality – sitting in on an interview gives you a real picture of the whole adviser and you can quickly see who is really better irrespective of the statistics.’

ASM

‘I aim to but I have not yet done a full month with every one as I do not have the time. I am well aware of it but I am out of the office all the time and do not get the chance.’

ASM

‘We are now getting monthly feedback on the QAF. It’s good to get feedback – it focuses the mind and makes you think about what you are doing and could do better to improve your skills. The AAT is less useful. It’s just a checking tool.’

PA

Most PAs also reported that they were given feedback from the AAT. PAs found this useful if it was personalised and directly related to targets.

‘[the ASM] is good because she sits down with you and goes through all the performance stats – we now know what is being recorded about you; the Model comes down to the quality of the manager.’

PA

On the negative side, the CETL was not fulfilling the coaching role, something some PAs would like to be able to tap into, but was generally booking diaries.

‘But it is the coaching side that I would like to use. She is doing her lone parent interviews and hasn’t been able to pass that on to anyone else.’

PA

The DASO role was currently having limited impact on PA workloads. There was still a lot of paperwork that PAs felt could be done by DASOs. Some of it would require additional training, in particular for IB or New Deal clients where a broader range of information was required for the interviews and paperwork to be completed.

There was no evidence to indicate that the Model had positively affected the ability of PAs to see the right people. In some cases, PAs felt they saw the right people already and nothing had really changed. In others, PAs felt their ability to see the right people had been weakened through lack of training in the specialisms they had been assigned, or because they were expected to widen their area of expertise, for example one lone parent adviser was expected to widen his clients to IB as well. Further, as discussed in Section 3.4, some New Deal and IB PAs were unhappy because they were having to ‘fill up their diaries’ with basic 13-week interviews, which meant they could not fit in ad hoc requests from their regular clients as quickly or easily.
‘Under the new Model it seems that your areas of specialism have been lost ... before you could concentrate on one customer group, whereas now I am expected to know a little bit about everything ... I don’t like it because from the customer’s point of view we just look like a jack of all trades. I can’t focus on lone parents anymore; I can’t give them extensive advice anymore.’

PA

‘I can understand that they might want to widen our client base, but our roles were as specialist advisers, and we understood the needs of our particular customers. That’s all gone out the window now...we are being asked to cover the JSA role more...but nobody picks up the work if I do JSA.’

LP/IB PA

3.5 Training

When asked if they had the relevant skills set for their role or if they required training, staff who were new to the role, regardless of grade, felt they required some training. Some of this training had been delivered but in some cases there was an outstanding training need. Some training does not appear to have been available, notably for DASOs, JCMs and CETLS.

‘I went through the routeway and identified where I needed upskilling in November and am supposed to have had all the training by March, but it’s already February and I haven’t had any.’

JCM

CETLs and DASOs found it most difficult to identify their own training needs due to the lack of clarity of their roles.

Technical training was a key skills gap across all staff grades. This might be on specific customer groups, particularly IB, and to a lesser extent New Deal and DEA. This was particularly frustrating for PAs who were the ‘New Deal’ adviser or the ‘IB adviser’, so were being sold as an expert in that benefits area. They felt uncomfortable sitting in front of customers when they felt unprepared for the role. Some commented that ‘soft’ skills training was readily available but technical training was lacking.

‘The name [IB Adviser] suggests that I am a specialist in these benefits. The person who was dealing with this before me had four weeks of specialist training in one block followed by another four weeks later on – I haven’t had a single day of training so far...I’ve just been looking things up on the system.’

PA
'We had a message this morning saying that we are going to have to start doing the JSA interviews even though we’ve had no training at all. I need to know what I’m actually supposed to do; what the processes are. We are supposed to be professional people giving the best service we can.’

PA

For CETLS and DASOs, identified training needs were mainly around eligibility rules and markers, although PAs also identified training needs in this area, for example having problems with markers that disappeared when the system was updated, suggesting that they were not putting these on or updating them correctly. They also commented that it takes too long to find things with the customer sat in front of them and makes them seem incompetent and also felt this might be addressed through training, as there might be ‘shortcuts’ they did not know about.

‘We have had little or no training – my colleague attended a pilot training course and I did a day’s marker training, but it didn’t actually explain enough about how to actually do markers. We need more technical training for example on markers and eligibility rules for New Deal which are very complex. The rules for 13-week interviews I thought I knew, but the stats say we are failing so obviously I don’t.’

DASO

The other area where PAs particularly felt they needed training was on doing Better Off Calculations (BOCs). As discussed in Section 5.1.3, lack of training in this area was directly impacting on the number of BOCs completed.

Most PAs complained that they found it difficult to schedule in training now they did not have control over their own diaries and were being expected to fit in more interviews.

‘To be honest, we all have to rely on self-learning, or learning from each other – we pick things up here and there. We don’t have time to look through the intranet, or even understand it half the time. We don’t have half hours here or there to learn or discuss things.’

PA

It was also clear from their comments that whilst computer-based training was more flexible as you could more easily fit it around work commitments, it was not popular with some PAs because they valued the ability to tailor the training to their needs, for example through asking questions, which was possible with face-to-face training.

‘All the training has been taken out of the classroom and is all online. That learning just doesn’t work in the same way – it doesn’t sink in the same way, and often we don’t have the time to sit here and look at the system.’

PA
JCMs identified a need for Health and Safety training to enable them to feel comfortable in carrying out their new site health and safety responsibilities.

ASMs, particularly those who had not come from a team leader background, needed technical training, particularly in compiling and using statistics such as AAT and LMS.

‘I do go to presentations, and really they are just talking at you, not actually telling you how to do something... There should be district-wide training on AAT clearly defining what you should and shouldn’t do or how to mark it. At the moment I think we are probably comparing apples with pears.’

ASM

3.6 Resourcing issues

The major resourcing issue was a general concern about increased workload across the board. In some areas, there was a freeze on recruitment, which meant they could not fill vacant positions. In most offices there was not sufficient ‘slack in the system’ to cover for holidays or absences for other reasons.

‘It can be difficult sometimes when we advisers have to go to support the JCM team when there is only one of them in the office. We have to go onto another floor and we cannot get computer access there and all the paperwork we need tends to be on the other floor.’

IBPA

As discussed in the previous chapter, in multi-site offices, managers were particularly stretched not least because valuable time was spent travelling between sites and there were some concerns, particularly in relation to health and safety, as to who assumed site responsibilities when the JCM was not there.

In terms of non-staff resources, in most sites there were insufficient desks, resulting in unsatisfactory practices of hot-desking and advisers sat in the wrong part of the office away from other members of their team. This problem was exacerbated in multi-sites:

‘You have to plan on when to come into a small office as I have no desk or PC to use, so have to plan on who is in, so you can have someone else’s desk.’

JCM

Staff in most offices complained of inadequate space and less than perfect layouts of the office. This could create physical divisions between the team and manager, or between the two teams, which was not conducive to building or maintaining good working relationships.
IT issues were often mentioned, again, most commonly in multi-sites; in particular the inability for multi-site managers to obtain remote access to the other site. There were other also less global issues such as log-ins not set up for staff, or markers disappearing, assumed to be because of software upgrades.

‘You have to be on-site to pull information from the system – you can’t do the checks off-site. You can’t log in remotely...I can look at what appointments the PAs have got, but I can’t actually change anything, so if I want to rearrange anything I have to travel to the site...If I want to look at productivity I need to pull off the sampling for the various advisers, but I need to be on-site to do that.’

ASM

‘The CETL cannot change the diaries from another [remote] office. They are trying to get over that by him ringing someone here and telling them what to do over the phone.’

PA

Telephony issues were also commonly mentioned, which particularly impacted on the DASO role. Examples were PAs having to leave phones off the hook in order for them to transfer through to the DASO, and having insufficient phones that could pick up PA calls.

These aspects of resourcing, whilst not directly attributable to the Model, may potentially have detracted from some of the benefits of the Model.
4 Working relationships

It was recognised that the effectiveness of the new Model was dependent, to a large degree, on good working relationships both within the Advisory Services team and with the JCM team. Staff views of working relationships within the Advisory Services team, and between this team and the JCM team were explored with all staff and managers. However, it should be noted that the only member of the JCM team who was covered in the research was the JCM, so we have no counterpoint to Advisory Services team views about staff in the JCM team other than that of the JCM.

Many of the issues that have impacted on working relationships either within or across teams have already been discussed in previous chapters, so are only briefly referred to in this section.

4.1 Working relations within the Advisory Services team

Relationships within the Advisory Services teams were good overall, with no big issues found by the research. In larger offices, staff reported that they worked in their own small teams, but worked together well where necessary.

As mentioned in Chapter 3, there were some issues relating to staff grade, namely DASOs being uncomfortable with performing ‘band C’ work, and PAs being uncomfortable with supervision by a CETL on the same grade.

The confusion or lack of clarity about the CETL role, and to a lesser extent over the DASO role, could also create tensions. For example, in some sites, PAs had become confused over line management responsibilities such as annual leave, particularly where the previous Advisory Services Manager (ASM) had become the CETL.

As might be expected, working relationships were most problematic in multi-sites. Particular issues were around:
who was responsible when the ASM was not there for resolving staffing or
customer issues – was it the deputy ASM, JCM or CETL. Since this was not always
clear, it could result in confusion and delay in resolving issues furthermore, some
ASMs commented that band C staff had to get used to not having a manager
on site all the time and seeking to resolve issues themselves rather than always
referring them up;

• the logistical challenges of managing staff across sites, including ensuring that
everyone was fully briefed on a timely basis and keeping them all feeling part of
the ‘big’ team;

• the location of CETL – ideally they needed to be on same site as the ASM and
PAs to fully support them and, as noted in Section 3.6, lack of remote access to
systems only exacerbated these problems;

• time wasted travelling between sites.

4.2 Working relationships between the ASM and
JCM team

The relationship between the ASM and JCM was crucial to good cross-team
working and these relationships were most stretched in multi-site offices, where it
was logistically more difficult for the ASM and JCM to regularly meet and maintain
close contact.

Less senior staff (CETLs, PAs and DASOs) felt working relationships had deteriorated
– describing them as more ‘us and them’ than before. This seemed to be because
without a common manager they were working more closely in their own team
so did not ‘see’ each other quite so much. As discussed in the previous chapter
(Sections 3.2.3 and 3.6) this was being exacerbated by lack of clarity between the
two band D managers on general office and staffing issues and also where the
two teams were geographically split in the building, such as on different floors.

‘We don’t have much to do with them now. It seems to have been really cut
apart.’

DASO

‘In the old Model we had one JCM who controlled everything, and any
problems you had would report to that one person and it would be cascaded
down and sorted. Now there are two managers with two teams and issues
are not addressed as quickly or as satisfactorily as they should be.’

PA

There was still evidence of sharing of staff where necessary (particularly the DASO)
but less senior staff thought it happened less than it did prior to the Model. There
was also a perception from the ASM team that it was one way, for example with
the PAs helping the FAs but not the other way around. However, as noted in the
introduction to this section, this finding should be treated with caution since we only interviewed the JCM from the JCM team and other members of the JCM may have felt that they helped the ASM team more than they received help from them.

Some concerns were expressed about customers being dealt with differently or being told different things by the two teams. This may reflect the roll out of Jobcentre Plus happening at a similar time in one or two offices, as a number of the examples given in this regard reflected differences in what was being said to clients by the different parties involved. This included what types of activity were said to qualify as evidence of having been actively looking for work by PAs and front of house staff doing the fortnightly checks on JSA claimants, or complaints that contact centre staff were giving incorrect information to new claimants, for example about evidence required to support a claim or how quickly they would be seen by Advisory Service staff. However, notwithstanding that the roll out of Jobcentre Plus may have exacerbated these issues in one or two offices, it still serves to highlight that now that two teams 'share' the customer there is a need to ensure that clients receive consistent messages.
The overriding objective of the new Model was to help improve the quality of service and productivity and meet JOT. All staff and managers were, therefore, asked about what impact they felt the Model was having on various aspects of performance and productivity, namely hard measures including:

- the number of WFIs they were conducting;
- FTA rates;
- the number of BOCs being done.

Their views were also canvassed on whether the Model was helping to adapt to meeting the new JOT, which had replaced Job Entry Targets (JET) from April 2006 and helping to ensure compliance with the advisory process, i.e. ensuring clients were being seen at the correct stages, e.g. 13 weeks after signing on and at 26 or 52 weeks.

Finally they were asked about whether they felt the new Model had any impact on the quality of service provided to clients.

### 5.1 Impact of Model on hard measures

Overall, senior staff were more positive about the potential impact of the Model on productivity and performance. Whilst they recognised that there had been little impact on hard measures visible in the figures recorded to date, they were confident that it would feed through in time, reflecting that the increased resources, support and checks that had been put into the advisory service or were being facilitated by the new Model, could only serve to drive up quality.
'The ASM is focused on quality so should drive up outcomes – looking at individual adviser performance should lead to better performance.'

DM

'I am starting to see the impact of Advisor Service Managers’ interventions but it is a case of starting to see an impact rather than see a very clear demonstrable measurable impact on a scale that I would like to see.'

DM

There was anecdotal evidence of the local impact of checks. In more than one case study, PAs commented on having to go back over previous cases to do work which had been missed previously.

‘The one thing they focused on in New Deal was Gateway overstayers. This was not emphasised to us until October when part of the year had gone. We did not know how important it was so we fell behind. The emphasis before was getting people into work and sustainable jobs, and if we felt it would help people, we would keep them in the Gateway a bit longer.’

PA

Less senior staff felt that the Model had not had a positive impact on productivity and performance overall. They conceded that a greater quantity of interviews were being carried out, but this, they felt, was at the expense of quality of advice and flexibility of the service they were able to offer.

‘They haven’t taken into account what actually happens at our level. They should be looking at factors that affect us: customers turning up later; coming without their forms; customers not being able to understand the forms; customers not speaking English. We actually feel very sorry for some of them because we don’t have the time to help them any more.’

PA

‘We have so many things to think about with the targets that we cannot always concentrate on the customer.’

PA

5.1.1 WFIs

The number of WFIs was perceived to have increased where bookings had been taken out of the hands of PAs, through the CETL overseeing diaries and through the impact of the AAT and targets. Some sites had also adopted a strategy of overbooking to counteract the impact of FTAs.

‘There is more productivity in the advisors’ diaries e.g. lone parents have a high fail to attend rate so we have halved their interview times.’

ASM
However, there were also concerns expressed that in a tightly resourced system, targets simply focused the emphasis on one area at the expense of another or moved the problem around as the following example illustrates:

‘I’m now in a total no win situation because I am supposed to bring down the number of New Deal overstayers but I now get overstayers referred to me from other offices, which means I have to deal with them as a priority which means that my existing customers then turn into overstayers.’

PA

5.1.2 FTA rates

The FTA rates were felt to have remained unchanged. Pre-calls were not being made in most sites as they were not seen as a priority by managers since they had no faith that devoting DASO time to this task would make a real difference. One manager commented that it was what the PAs did with the FTA time that was important, either doing more interviews or using the time for BOCs.

‘I would not expect to see a reduction in fail to attend rates because you can’t get people to turn up because people are people.’

DM

5.1.3 BOCs

The impact on BOCs was more mixed. This appeared to depend on whether training had been carried out at a site and managers had been pushing it as a priority. As noted earlier, in many of the offices surveyed not all PAs had had the necessary training, although in a number of these it was a planned to take place. It was recognised that the AAT had put more focus on BOCs, but BOCs were time consuming to undertake and thus, the time involved had to be traded off against other service elements. Managers’ opinions about the value of doing BOCs, particularly at first interview, was, therefore, divided.

‘No change. Being able to do more of those firstly depends on the ability of the PA to do them, and secondly the time to be able to do them. The way we are set up here means that really only the lone parent or IBPA PAs have the time and flexibility to do them. The rest don’t have the time at all in reality.’

CETL

‘Benchmarks and targets have put pressure on advisers and mean that customers maybe do not get the best service. There is too much emphasis put on better off calculations being done. These should be done when appropriate – it is not being enforced.’

DM

Whilst BOCs were not a specific element of the Model, it was envisaged that the Model should have helped to facilitate an increase in the number being done and they were, thus, included as a ‘hard measure’.
5.1.4 Adaptation to JOT

Staff were questioned about whether they thought the new Model had helped them to adapt to the new ways of working required by JOT. Staff were unable to form a view as to whether the new Model was helping the adaptation to JOT, mainly due to the delays in receiving feedback on performance in relation to JOT.

More generally in response to this question, staff, especially PAs, again voiced their concerns that quality was being undermined by a demand for quantity and the new JOT targets played a part in this. Some also commented that they preferred JET as they had more immediate feedback on how they were doing in helping clients into work.

‘I hate JOT, and I have no idea if the Model has made any difference ... they come out with all the spiel about how it is calculated differently – four months in arrears etc., and how the IR plays a role ... I’m not sure how much impact I can make other than helping the hardest customers. I see JOT as a bad measurement full stop.’

ASM

‘The onus is more on the client now to look for work themselves. We point them in the right direction, rather than doing job searches for them, we encourage them on ways to find out about ways to get into work, more self-service, checking newspapers, encouraging them to be more self-reliant.’

PA

5.1.5 Adviser process compliance

The general view of staff was that that the Model has or would improve adviser process compliance and WFIs would be conducted to time through the additional focus and checks on these targets. The AAT and hot spot reporting were felt to be the key drivers of this as areas of poor practice were being picked up because of greater checking and, resources allowing, were being rectified more quickly.

‘With this Model you can now identify areas where we haven’t complied in the past. The Model has allowed us to look at the processes and see where we have missed things like trigger interviews. We now have a better idea of the processes. That doesn’t mean to say that we will be able to do all parts of the process, but we will know and be able to measure what we are not doing.’

ASM

‘They probably wouldn’t have been spoken to for a couple of months or so, left to get on with it whereas now its more like “have you done this”, I’m looking at what they are doing and I can communicate to them if they are not doing some things.’

ASM
5.2 Impact on quality of service provided to customers

Staff generally felt they had little or no ‘hard’ evidence of any impact of the Model on the quality of service provided to customers. However, opinions of its possible effects varied depending on job role.

Senior staff were most positive about the possible impacts. They felt that performance would improve as the closer management and monitoring of advisers could only serve to drive up the quality of service provided to customers.

However, PAs and other staff generally felt that quality was being lost in search of quantity, so they did not perceive an improvement. If anything they felt it was a decline because it was turning into a production line in their eyes.

‘It is not personal now, not as tailor made, it is pointing them in the right direction to help themselves. When you are interviewing clients you cannot stick to an agenda all the time, people are individuals and you have to treat them as such. Not everyone has the internet, so you cannot say are you on the internet, they say no, it is patronising, people cannot afford it.’

PA

Some staff commented that the new appointment arrangements left insufficient flexibility in the diaries for short-notice appointments, which they felt were necessary for New Deal customers, and were compulsory for under 18s.

Anecdotally, they felt there might be improvements in terms of customers being seen more, having the phones answered more quickly, and having FAs sort out their money before seeing the PAs, but this was balanced by having to direct customers to the central call centre for many queries they would have previously handled on site, a Jobcentre Plus structural change which nevertheless was perceived to impact on customers.

‘When customers come in and go up to the front line with a question, there is no personal service, they are directed to the phones and to speak to a call centre in the north of England who have no local knowledge and cannot even pronounce the place names.’

PA

Some staff also commented that whilst the Model might potentially improve service quality, they were at the same time suffering staff cuts which would have mitigated any positive effects.
6 Conclusions

This final chapter draws together the main findings of the research and highlights some of the key lessons. It needs to be recognised that these represent the views of staff. No management information on productivity or performance was currently available to support this review and provide more objective evidence of the effectiveness of the new Model to date.

Overall, staff views of the introduction and impact of the new Model were mixed. There were felt to have been some benefits from implementing the new Model but to date it has not been a resounding success in any case study area.

Managers were the most positive about the new Model and their roles. They felt the additional management and support for PAs was increasing productivity and quality. They believed that whilst the impact on harder measures to date had been limited, they were confident that these would feed through with the increased resources and focus on targets.

The findings were broadly consistent across the eight case study areas and suggest that the national Model can work, with the possible exception of multi-site offices, where management resources were too stretched. However, Spearhead sites were clearer that this and other issues needed to be addressed, if the Model was to achieve its full potential. (Those who had implemented the Model more recently, whilst recognising the same problems and issues, were more inclined to feel that the Model had not yet had time to fully bed down and thus, that it was possibly too early to fully assess the impact.)

The rapid implementation of the Model was also felt to have slowed the bedding down process. There was insufficient time to get staff buy-in and complete basic training for the new roles.

The splitting of the management of the jobcentre between two band D managers was generally felt to have been a success by all staff, as these managers have been able to provide higher levels of support for their direct reports. However, a good working relationship between the two managers was felt to be crucial to the overall effectiveness of the jobcentre and required strong support from OMs and clarification of some of the staffing and office management responsibilities.
The Model was not felt to be working as well for multi-site offices. Management resources were too stretched, which impacted on their ability to adequately manage all aspects of their staff and site responsibilities. It also made it more difficult for the JCM and ASM to build and maintain a close working relationship. Inadequate IT systems compounded the problem because remote working was not possible.

The new DASO and CETL roles were seen to have had some limited benefits. In particular, the CETL having assumed control over PAs’ diaries was felt to have helped drive up the number of WFIs being conducted and ensured AAT checks were being undertaken. Currently the biggest impacts of DASOs have been answering PA phones and booking appointments that have done little to reduce the administrative burden on PAs.

The DASOs and CETLs were not taking on their full roles and priorities varied. This was due to insufficient time and training, and for the CETL in particular, lack of a clear job description. For DASOs, being used to ‘cover’ other duties had an impact on the time available for their own role. As a result, all staff recognised that PAs were not getting the intended levels of extra support under the new Model and were still undertaking most of their non-advisory duties. CETLs and DASOs were the least satisfied with their roles under the new Model.

PAs felt that the increase in the number of WFIs they were required to conduct, coupled with the fact that the DASOs had not been able to relieve them of most of their non-advisory work to create extra ‘time’ was having a negative effect on the quality of the service they could provide for clients. This was having a negative impact on their job satisfaction and was compounded by what they perceived to be the loss of control of their own workload, with appointments being booked and monitored by the CETL. The Model was also not felt to have improved PAs ability to see the clients they were specifically trained to assist. Indeed, some PAs felt things had deteriorated in this regard as they were required to cover a broader range of clients to help meet productivity targets or cover for staff shortages, although it was not clear whether this was directly the result of the Model.

There were some grade issues. PAs felt uncomfortable with the CETL role being the same grade. This was the case under the previous model\(^9\) and PAs felt the new CETL role had not addressed this issue. DASOs felt uncomfortable with doing what they perceived as some band C (PA) tasks. These, together with the lack of clarity over the DASO and CETL roles, caused some tensions within the advisory services teams, although generally working relationships were good.

\(^9\) PAs and PAMs were the same grade.
However, working relationships between the advisory services team and other staff were felt to have deteriorated, particularly amongst less senior advisory service staff. There was a feeling that they were now two separate teams in the office and less of a feeling of working together to achieve one goal. This was due, in part, to lack of clarity over the management of some aspects of staffing between the ASM and JCM and also concerns that customers were being told different things by the two teams and not receiving consistent messages.

The numbers of WFI was felt to have increased although PAs felt this was at the expense of quality of service. Adviser process compliance was also felt to have improved, as a consequence of the increased focus on targets and productivity which the new Model had facilitated.

The Model was also seen to be facilitating the deployment of the AATs and QAFs and, where used in an effective manner, these were felt to be helping PAs focus their activities and identify areas for further improvement and development.

To date, there had been no improvement in FTA rates and the impact on the number of BOCs conducted varied. This seemed to be due, to a large degree, to the views of the managers involved rather than the Model per se. Not all managers were convinced of the efficacy of pre-calls, so this aspect of the DASO’s role was not seen as a priority, and calls were not being made. However, there was some evidence of consideration of the constructive use of FTA time. Similarly, the impact on BOCs varied depending on the managers’ focus, although lack of training was also a factor.

Staff were generally unable to comment as to whether the Model has helped adaptation to JOT.

6.1 Key lessons

The research has highlighted a number of key lessons about the Model and its implementation. These are briefly listed below:

• in terms of the implementation of the new Model, the key lesson for introducing other major structural or procedural changes is not to do this too rapidly and ensure people issues are addressed (e.g. through good, face-to-face communication and receiving necessary training);

• management resources in multi-site offices need to be reviewed;

• job roles (particularly CETL and DASO) need to be clarified and sufficient time available to carry them out effectively. Consideration should be given to whether the CETL should be a full time role;

It needs to be recognised that the only member of the JCM team that was covered by the research was the JCM, so we have no counterpoint to the views of the advisory team staff.
• training needs to be in place for all staff to ensure they can carry out their roles effectively;

• resourcing issues, whilst not directly relevant to the Model, were impacting on its success. They, therefore, need to be addressed, particularly, but not exclusively, at multi-sites. This includes space, desks, telephony and the accessibility of MI and PA diaries across multi-sites;

• ensure ASM comply with the guidance to undertake pre-calls work to reduce FTAs;

• continued support is required from the OM to build and maintain good relationships between the ASM and JCM and to ensure the teams have shared goals. This will ensure the ethos of ‘one jobcentre’ is maintained and that customers receive consistent messages from members of different teams.
Appendix A
Technical appendix

This section provides further details of the methodology. Topic guides used in the research are also appended.

An internal review of the process of rolling out the new Model had already been undertaken. This review mainly involved the collation of data on some of the key changes, including the number of promotions and deployments and financial information. It was not designed to provide feedback on how the Model was working and nor was it able to provide initial performance data. Research amongst staff was, therefore, required to provide early feedback on the implementation and effectiveness of the new Model. It was originally anticipated that MI on productivity and performance would be available to support this review and complement the more qualitative assessments obtained from staff. However, this data is currently not available at the required (jobcentre) level of detail.

A qualitative research methodology was adopted comprising eight case studies with jobcentres across England, Scotland and Wales. A case study approach was adopted (as opposed to spreading the interviews across a large number of sites) as it was felt that this approach would provide a more holistic view of how the Model was working in these offices and better understanding the impact of these inter-relationships on the overall performance of that jobcentre. The main drawback of this approach was recognised to be that if we were only covering a limited number of sites and some of these were not ‘typical’ (for example the operation of the Model had been affected by a number of local factors) it might not be possible to draw conclusions as to how the Model was working more generally. However, as sufficient budget was available to cover a reasonable number of sites, this was not felt to present a significant risk.
Jobcentres were chosen to represent a cross-section of different types and sizes of jobcentre and the areas they served:

• Spearhead and non-Spearhead offices – Spearhead offices were the first to implement the new Model. They started to implement the Model from April 2006. Non-Spearhead sites implemented the new Model in August-September 2006;

• multi-site and single site offices – multi-site offices being those where the JCM and ASM covered more than one office (typically up to three). These were typically also the larger offices;

• a range of labour markets;

• urban and rural locations.

Table 7.1 provides details of the eight jobcentres covered.

### Table 7.1 Profile of jobcentres surveyed

<table>
<thead>
<tr>
<th>Region</th>
<th>Single/multi-site</th>
<th>Spearhead/ non-Spearhead</th>
<th>Labour market status</th>
<th>Urban/rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>East of England</td>
<td>Single*</td>
<td>Spearhead</td>
<td>Low</td>
<td>Rural</td>
</tr>
<tr>
<td>North West</td>
<td>Multi</td>
<td>Spearhead</td>
<td>Low</td>
<td>Urban</td>
</tr>
<tr>
<td>London</td>
<td>Single</td>
<td>Spearhead</td>
<td>High</td>
<td>Urban</td>
</tr>
<tr>
<td>Scotland</td>
<td>Multi</td>
<td>Spearhead</td>
<td>Middle</td>
<td>Rural</td>
</tr>
<tr>
<td>Wales</td>
<td>Multi</td>
<td>Non</td>
<td>High</td>
<td>Rural</td>
</tr>
<tr>
<td>North East</td>
<td>Multi</td>
<td>Non</td>
<td>Middle</td>
<td>Rural</td>
</tr>
<tr>
<td>South East</td>
<td>Single</td>
<td>Non</td>
<td>Low</td>
<td>Urban</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Single</td>
<td>Non</td>
<td>High</td>
<td>Urban</td>
</tr>
</tbody>
</table>

Within each Jobcentre, interviews were conducted with staff directly impacted by the new Model:

• the DM and Operations Managers (OMs);

• the ASM and JCM;

• CETLs and PAs;

• DASOs.

In total, 90 interviews were conducted across the eight jobcentres. Most interviews were conducted as face-to-face depth interviews. Some senior staff were interviewed by telephone for their convenience, as they were not based at the jobcentre. Face-to-face interviews lasted 30-40 minutes on average, while telephone interviews were a little shorter, at around 20 minutes. Some interviews with less senior staff were conducted in pairs or mini-groups where this was practicable, as it was our experience that multiple interviews help generate a fuller discussion of the issues as respondents are able to ‘bounce off’ each other.
A range of different PAs was interviewed, including JSA Advisers, New Deal Advisers, IB and Lone Parent Advisers, and DEAs, reflecting that the key focus of the new Model was to improve their performance and productivity. It also enabled us to explore how views varied between the different types of PA.

Table 7.2 shows the number of interviews achieved with each group against the broad targets set. All groups were spoken to in each of the eight jobcentres covered in the study.

**Table 7.2  Breakdown of interviews achieved**

<table>
<thead>
<tr>
<th>Job title</th>
<th>Target</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Manager</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Operations Manager</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Jobcentre Manager</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Advisory Services Manager</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Customer Engagement Team Leader</td>
<td>8-10</td>
<td>9</td>
</tr>
<tr>
<td>DASOs</td>
<td>10-12</td>
<td>13</td>
</tr>
<tr>
<td><strong>Personal Advisers</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JSA Adviser/New Claims Adviser</td>
<td>10-12</td>
<td>14</td>
</tr>
<tr>
<td>New Deal Advisers</td>
<td>8-10</td>
<td>9</td>
</tr>
<tr>
<td>Incapacity benefit advisers/lone parent advisers/SIPA</td>
<td>6-8</td>
<td>10</td>
</tr>
<tr>
<td>DEAs</td>
<td>2-3</td>
<td>3</td>
</tr>
</tbody>
</table>

Fieldwork took place between 29 January and 23 February 2007.
Appendix B
Topic guides

- Introduce self and IFF
- Give brief introduction of research if necessary

We are helping to evaluate the effectiveness of the new Advisory Services model and are talking to staff at all levels about how the new model has been working.

REASSURANCES
- IFF is an independent market research agency
- If you would like to know more about IFF Research, you can call Sandy Gamble (Project Manager) on 020 7250 3035
- If you would like to speak to someone from the DWP about the research, you can call Elizabeth Cole at 0114 2098266
- MRS code of conduct – nothing you say will be attributed to you directly unless you specifically request for feedback to be identified or followed up.
A – OVERALL VIEWS
1. From your point of view, how has the new Advisory Services Model been working, generally?

PROBE
- What do they see as the most successful aspects of the model so far?
- And what aspects of the model are not working as well?
- In what ways could the model be improved?

B – IMPLEMENTATION
2. What have been the major challenges to implementing the new Advisory Services Model?

PROBE
- How have/are these being addressed?

3. How has the implementation of the model worked out at a local level?

PROBE
- Have there been any lessons learned?
- What has been the impact of the new model on day-to-day working?

C – WORKING RELATIONSHIPS
4. What are your views about splitting the Jobcentre Manager and Advisory Services Manager functions?

PROBE
- Has it made it more or less difficult, or the same? What are benefits/downsides?
- What particular issues have arisen? Are these temporary, will they be worked out, or do they think they might get worse over time?
- Is it an improvement on the previous system or not?

5. Are the Administrative Officers and Customer Engagement Team Leader roles working effectively?

PROBE
- What’s working well/not so well?
- What’s their evidence of this?
D – OUTCOMES

6. Now thinking about the targets and service levels the Jobcentre has to achieve, how has the new model influenced adaptation to working towards the new JOT target?

PROBE IF IT HAS HELPED OR HINDERED
- How and why?

7. What has been the impact of the model on Personal Advisers’ ability to carry out their work in terms of hard measures such as
   a. the number of WFls conducted?
   b. FTA rates?
   c. number of better-off calculations done?

PROBE
- Why?

E – QUALITY OF SERVICE

8. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?

PROBES
- In what ways has it changed? For better or worse? PROBE FULLY

9. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?

10. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?
- any other suggestions for improvements?

THANK AND CLOSE
- Introduce self and IFF
- Give brief introduction of research if necessary

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**A – OVERALL VIEWS (2-3 mins)**

11. From your point of view, how has the new Advisory Services Model been working, generally?

**PROBE**
- What do they see as the most successful aspects of the model so far?
- And what aspects of the model are not working as well?
- In what ways could the model be improved?
B – IMPLEMENTATION (3-5 mins)

12. What have been the major challenges to implementing the new Advisory Services Model?
   PROBE
   - How have/are these being addressed?

13. How has the implementation of the model worked out at a local level?
   PROBE
   - Have there been any lessons learned?
   - What has been the impact of the new model on day-to-day working?

C – VIEWS OF ROLE (3-5 mins)

14. And how do you feel about your own role under the new Advisory Services model?
   PROBE
   - How satisfied are they with it, overall?
   - What is good about it?
   - What is bad about it?
   - Do they understand what is expected of them in their new role?
   - Do they feel they’ve had appropriate training for their new role?
   - Are there any areas where they could use more training?

15. What are your views about splitting the Jobcentre Manager and Advisory Services Manager functions?
   PROBE
   - What are benefits/downsides?
   - Is it an improvement on the previous system or not?
   - As best as they are aware, how well does the JCM/ASM relationship work?
   - As best you are aware, how are the working relationships between different the JCM and ASM team panning out generally?

16. Are the Administrative Officers and Customer Engagement Team Leader roles working effectively?
D – OUTCOMES (5 mins)
17. What has been the impact of the model on Personal Advisers’ ability to carry out their work in terms of hard measures such as
   a. the number of WFls conducted?
   b. FTA rates?
   c. number of better-off calculations done?
   PROBE Why?
18. Now thinking about the targets and service levels the Jobcentre has to achieve, how has the new model influenced adaptation to working towards the new JOT target?
   PROBE IF IT HAS HELPED OR HINDERED
      - How and why?

E – QUALITY OF SERVICE (2-3 mins)
19. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?
   PROBES
      - Why?
20. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?
   PROBE
      - appointment arrangements
      - quality of advice or assistance provided
      - ease of making contact with the service
21. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?
      - Any other suggestions for improvements?

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A – PREVIOUS ROLE (1 min)
2. Firstly, can I just check what was your role (job title) before the new Advisory Services Model was introduced?

B – OVERALL VIEWS (5 mins)
3. From your point of view, how has the new Advisory Services Model been working, generally?

PROBE
- What do they see as the most successful aspects of the model so far?
- And what aspects of the model are not working as well?
- In what ways could the model be improved?
C – IMPLEMENTATION (5 mins)
4. How has the implementation of the model worked out at a local level?

PROBE
- Have there been any lessons learned?
- What has been the impact of the new model on day-to-day working?

D – VIEWS OF ROLE (5 mins)
5. And how do you feel about your own role under the new Advisory Services model?

PROBE
- How satisfied are they with it, overall?
- What is good about it?
- What is bad about it?
- Do they understand what is expected of them in their new role?
- Do they feel they have the necessary skills for their new role?
- Do they feel they’ve had appropriate training for their new role?
- Are there any areas where they could use more training?

E – WORKING RELATIONSHIPS (5 mins)
6. How are the working relationships between different parts of the advisory services team panning out, generally?

- What problems have occurred? Have/are they being addressed?

PROBE [IF SPLIT SITE]
- How has being a split site affected it?

7. And how well is your relationship specifically with the JCM working out?

PROBE
- And how about the relationships with the team managed by the JCM?

8. How have you organised your team of PAs (and DEAs, if appropriate) under the new model?

PROBE
- Has it become easier or more difficult to make more effective use of the specific skills, experience and training of their PAs, or has it made no difference?
9. Are the Administrative Officers and Customer Engagement Team Leader roles working effectively?

PROBE
- Do they understand their roles? Do others?
- What’s working well/not so well?
- What’s their evidence of this?

F – OUTCOMES (10 mins)

10. What has been the impact of the model on Personal Advisers’ ability to carry out their work in terms of hard measures such as

   a. the number of WFs conducted?
   b. FTA rates?
   c. number of better-off calculations done?

PROBE
- Why?

11. Is the model helping adviser process compliance (for instance JSA/IB/IS process and key New Deal delivery objectives?)

12. Now thinking about the targets and service levels the Jobcentre has to achieve, how has the new model influenced adaptation to working towards the new JOT target?

PROBE IF IT HAS HELPED OR HINDERED
- How and why?

13. One of the objectives of the model is to help PA’s to develop their skills more quickly and effectively. Do you feel the new model is helping to support and develop PAs?

PROBE
- If not, why not?
- Do they carry out QAFs (Quality Assessment Framework) for each PA each month?
- Do they feed back results from the AAT (Advisor Achievement Tool) and QAFs to PAs each month?
- Does having the CETL help them to meet these goals? Are the CETLs collecting the necessary data to support the AAT and quality checks?
14. The model is also designed to give the PA's more administrative support so they can focus on providing advice to clients. Is this being achieved?

PROBE
- If not, why not?
- What is their evidence of this? Have they been told this by the PAs?
- In what ways do they think this could still be improved, if any?

G – QUALITY OF SERVICE (5 mins)

15. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?

PROBES
- Why?

16. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?

PROBE
- appointment arrangements
- quality of advice or assistance provided
- ease of making contact with the service

17. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?
- any other suggestions for improvements?

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A – PREVIOUS ROLE (1 min)
18. Firstly, can I just check what was your role (job title) before the new Advisory Services Model was introduced?

B – OVERALL VIEWS (2-3 mins)
19. From your point of view, how has the new Advisory Services Model been working, generally?

PROBE
- What do they see as the most successful aspects of the model so far?
- And what aspects of the model are not working as well?
- In what ways could the model be improved?
C – IMPLEMENTATION (2-3 mins)
20. How has the implementation of the model worked out at a local level?

  PROBE
  - Have there been any lessons learned?
  - What has been the impact of the new model on day-to-day working?

D – VIEWS OF ROLE (5 mins)
21. And how do you feel about your own role under the new Advisory Services model?

  PROBE
  - How satisfied are they with it, overall?
  - What is good about it?
  - What is bad about it?
  - Do they understand what is expected of them in their new role?
  - Do they feel they have the necessary skills for their new role?
  - Do they feel they’ve had appropriate training for their new role?
  - Are there any areas where they could use more training?

E – WORKING RELATIONSHIPS (5 mins)
22. How well is your relationship with the ASM working?

  IF SPLIT SITE: Has it been affected by cross-site working?

23. More generally, how are the working relationships between the advisory services team and your team panning out?

  PROBE
  - Are they working out as initially anticipated?
  - What problems have occurred? Have/are they being addressed?

  IF SPLIT SITE: How has cross-site working affected it?

F – OUTCOMES (1-2 mins)
24. Now thinking about the targets and service levels the Jobcentre has to achieve, how has the new model influenced adaptation to working towards the new JOT target?

  PROBE IF IT HAS HELPED OR HINDERED
  - How and why?
G – QUALITY OF SERVICE (2-3 mins)

25. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?

PROBES
- Why?

26. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?

PROBE
- appointment arrangements
- quality of advice or assistance provided
- ease of making contact with the service

27. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?
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A – PREVIOUS ROLE (1 min)
28. Firstly, can I just check what was your role (job title) before the new Advisory Services Model was introduced?

B – OVERALL VIEWS (5 mins)
29. From your point of view, how has the new Advisory Services Model been working, generally?
30. And in what way do you think the model could be improved?

C – IMPLEMENTATION (5 mins)
31. How well do you think the new model was communicated to you?

PROBES
- Were they given enough information about the reasons and implications of the change?
D – VIEWS OF ROLE (5-10 mins)

32. And how do you feel about your own role under the new Advisory Services model?
   PROBE
   - What is good about it?
   - What is bad about it?
   - Do they understand what is expected of them in their new role?
   - Do they feel they’ve had appropriate training for their new role?
   - Are there any areas where they could use more training?

33. Your role as Customer Engagement Team Leader is a new role under the new model – is it working effectively?
   PROBE
   - Are they collecting the necessary data to support the AAT and quality checks on PAs each month?
   - What about managing the DASOs - is this working out Ok?
   - How is the new DASO role working out?

E – WORKING RELATIONSHIPS (5 mins)

34. And generally, how are the working relationships between different parts of the advisory services team panning out?
   PROBE
   - And how about the working relationships between the AS team and the JCM team?
   - What problems have occurred? Have/are they being addressed?

IF SPLIT SITE
   - How has the new Advisory Services Model affected cross site working?

F – OUTCOMES (5-10 mins)

35. What has been the impact of the model on Personal Advisers’ ability to carry out their work in terms of hard measures such as
   a. the number of WFls conducted?
   b. FTA rates?
   c. number of better-off calculations done?
   PROBE
   - Why?
- Have the DASOs helped to reduce the number of ‘fail to attends’ and to improve compliance with the fail to attend process?

36. Is the model helping adviser process compliance (for instance JSA/IB/IS process and key New Deal delivery objectives?)

37. The model is also designed to give the PA’s more administrative support so they can focus on providing advice to clients. Is this being achieved?

PROBE
- If not, why not?
- In what ways do they think this could still be improved, if any?

38. Now thinking about the targets and service levels the Jobcentre has to achieve, how has the new model influenced adaptation to working towards the new JOT target?

PROBE IF IT HAS HELPED OR HINDERED
- How and why?

G – QUALITY OF SERVICE (5 mins)

39. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?

PROBES
- Why?

40. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?

PROBE
- appointment arrangements
- quality of advice or assistance provided
- ease of making contact with the service

41. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?

- any other suggestions for improvements?

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A – PREVIOUS ROLE (1-2 mins)
42. Has your job role changed since the introduction of the new Advisory Services Model?

IF YES
- What was it before?

43. In your current role do you specifically work in one area (i.e. type of customer, not geographic area)?

B – OVERALL VIEWS (5 mins)
44. From your point of view, how has the new Advisory Services Model been working, generally?

45. In what ways do you think the model could be improved?
C – IMPLEMENTATION (5 mins)

46. And how well do you think the new model was communicated to you?

PROBES
- Were they given enough information about the reasons and implications of the change?
- How well do they think the change over to the new model has gone overall?

D – VIEWS OF ROLE (5-10 mins)

47. And how do you feel about your own role under the new Advisory Services model?

PROBE
- How satisfied are they with it, overall?
- What is good about it?
- What is bad about it?
- Do they understand what is expected of them in their new role?
- Do they feel they have the necessary skills for their new role?
- Do they feel they’ve had appropriate training for their new role?
- Are there any areas where they could use more training?
- Has the model helped you to ensure you see the correct types of customers and make best use of your skills?

48. And are the Administrative Officers and Customer Engagement Team Leader roles working effectively generally?

PROBE
- Do they feel they have better administrative support (via DASOs) than under previous model?

E – WORKING RELATIONSHIPS (5 mins)

49. How are the working relationships between different parts of the advisory services team panning out, generally?

PROBE
- How well is the relationship between the ASM and JCM teams working out?
- What problems have occurred? Have/are they being addressed?

IF SPLIT SITE
- How has being a split site affected the way the team works together?
F – OUTCOMES (10 mins)

50. Now thinking about the targets and service levels the Jobcentre has to achieve, how has the new model influenced adaptation to working towards the new JOT target?

PROBE IF IT HAS HELPS OR HINDERED
- How and why?
- Has the introduction of the new CETL role had an effect on this?

51. What has been the impact of the model on your ability to carry out your work in terms of hard measures such as
   a. the number of WFIs conducted?
   b. FTA rates?
   c. number of better-off calculations done?

PROBE
- Why?
- Have the DASOs helped to reduce the number of ‘fail to attends’ and to improve compliance with the fail to attend process?

52. One of the objectives of the model is to help you and other PAs to develop your skills more quickly and effectively. Do you feel the new model is helping you to do this?

PROBE
- If not, why not?
- Does the AS Manager feed back results from the AAT (Advisor Achievement Tool) and QAFs each month?

53. The model is also designed to give you more administrative support so you can focus on providing advice to clients. Is this being achieved?

PROBE
- If not, why not?
- In what ways do they think this could still be improved, if any?

G – QUALITY OF SERVICE (5 mins)

54. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?

PROBES
- Why?
55. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?

PROBE
- appointment arrangements
- quality of advice or assistance provided
- ease of making contact with the service

56. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?

any other suggestions for improvements?

THANK AND CLOSE
<table>
<thead>
<tr>
<th>Name of respondent</th>
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<tbody>
<tr>
<td>Job title</td>
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<td>Office (and site if applicable)</td>
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<td>Time/date of interview</td>
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<td>Name of interviewer</td>
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**A – PREVIOUS ROLE (1 min)**

57. Firstly, can I just check what was your role (job title) before the new Advisory Services Model was introduced?

**B – OVERALL VIEWS (5mins)**

58. From your point of view, how has the new Advisory Services Model been working, generally?

**C – IMPLEMENTATION (5 mins)**

59. How well do you think the new model was communicated to you?
D – VIEWS OF ROLE (5 mins)

60. And how do you feel about your own role under the new Advisory Services model?
- PROBE
- What is good about it?
- What is bad about it?
- Do they understand what is expected of them in their new role?
- Do they feel they've had appropriate training for their new role?
- Are there any areas where they could use more training?

E – WORKING RELATIONSHIPS (5 mins)

61. Do you feel you are able to provide the PAs (and DEAs, if appropriate) with the level of admin support that they need?
- PROBE: why/why not
62. Do you feel you are helping to reduce the number of ‘fail to attends’#
63. How are the working relationships between different parts of the advisory services team panning out?
- PROBE: and how about the relationship with the JCM team?

F – QUALITY OF SERVICE (5 mins)

64. Do you feel there has been a change in the quality of service you provide to clients since the introduction of the new model?
- PROBES
- Why?
65. And overall, how do you think the model has impacted on the customer’s experience of using the Jobcentre service?
- PROBE
- appointment arrangements?
- quality of advice or assistance provided?
- ease of making contact with the service?
66. Do you have any other comments or issues you wish to raise about the new model or its impact on your work or Jobcentres generally?
- any other suggestions for improvements?

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