Defining Advanced Professional Practice in Telephone Guidance

Margaret Christopoulos, Sue Blyth, Oliver Burney, Jenny Hamilton, Alison Taylor and Hayley Warrington

Introduction

This paper is co-written by a team of five Quality Coaches from the Careers Advice Service (CAS) and a tutor from the University of Derby. Its purpose is to examine CAS processes and determine how these contribute to defining Advanced Professional Practice (APP) in telephone guidance. Quality coaches, together with CAS coordinators and managers, support the use of quality tools and approaches to recognise and enhance good practice in the CAS. This paper considers these.

The CAS was launched in 1998 (Watts and Dent, 2008), as learndirect advice, consequently rebranded CAS in 2008. It was managed, designed and developed until 2008 by Ufi/learndirect when the Learning and Skills Council (LSC) took over this remit. The CAS is delivered in two centres by BSS (Broadcasting Support Services) on behalf of the LSC. It provides an information, advice and guidance service for adults primarily in England and Northern Ireland. BSS is a not for profit organisation which provides public service contact points.

The guidance and advice service is delivered by Career Coaches, supported by Quality Coaches. In 2009, the CAS has 83 full time equivalent Careers Coaches, of whom eight are Quality Coaches. Coaches have a vocational qualification, NVQ4 in advice and guidance. In addition many have graduate and postgraduate qualifications. The five Quality Coaches co-authoring this paper have successfully undertaken a Postgraduate Certificate in Telephone Guidance from the University of Derby. Careers Coaches are responsible for delivering advice and guidance at a distance, including by email, offering CV support and telephone guidance.

Quality Coaches develop a consistent approach to practice by providing feedback based on direct and study based experience of guidance practice. They mentor inexperienced and experienced practitioners to develop the quality of the service, and provide the opportunity for continued professional development (CPD). They work with external organisations to promote the benefits of careers guidance, and raise CAS’ professional profile in the wider guidance community.

This paper focuses on the telephone guidance service. The service received around one million telephone calls in 2006 (Watts and Dent, 2008) and Watts and Dent note that, ‘guidance delivered by telephone is of good quality measured against standards used in the assessment of face-to-face guidance’ (p.464).

There is currently no formally agreed definition known to the authors of ‘Advanced professional practice’ (APP) in the guidance field. Coaches who have undertaken the postgraduate certificate consider specialist expertise, high skills and knowledge levels as essential features. Schon (1983), Hambly (2002) and others have considered the ingredients of APP, although Schon’s work considered the topic in general, not in relation to career guidance. All Coaches have achieved advanced practitioner status with the Institute of Career Guidance which demonstrates their commitment to CPD. Membership requires that Coaches adhere to the ICG Code of Ethics (ICG, 2009). Reflecting upon ethical issues in using such techniques is considered paramount to ensure they operate within the ethical guidelines of the profession. One of the authors of this paper (Hayley Warrington) offers a working definition here, ‘an advanced professional practitioner in telephone guidance is one who welcomes new ideas for practice, actively tries out new techniques taking a flexible approach and openly engages in self-reflection’.

APP is subjective - its boundaries unclear, arguably a debate rather than an approach; a landscape rather than a destination. CAS’ sophisticated toolbox of APP defining systems contribute to the identification and promotion of excellent practice. This paper considers six of these quality processes and suggests ways in which they combine to define and develop the concept of APP in telephone guidance. This paper does not seek to describe and analyse the many facets of APP in telephone guidance, these will be considered in a future publication.

Three of the processes considered here take place formally in monthly call reflection sessions, these are reflective practice, mentoring and skills/cluster groups. The other three, the e-portfolio, the Quality Framework and levelling are considered separately in later sections.
Reflective practice

Reflective practice has been identified as key to the role of a professional (Schon, 1983). At the CAS, reflective practice is considered an integral part of the Careers Coach role and takes the form of monthly call reflection sessions, self-reflection and peer to peer reflection. Through these forums Coaches are provided with the space and support to reflect upon how their personal practice fits in with best practice, defined by the CAS through quality frameworks.

Reflection sessions are facilitated by Quality Coaches who provide space and time for the Careers Coach to reflect on their practice through listening to recorded calls together. A Careers Coach can also request time to engage in self-reflection, listening to examples of their, or their colleagues’, practice independently. Regular peer to peer reflection sessions are organised so that Coaches also have the opportunity to receive peer feedback and share best practice. Reflective practice is a prominent feature of the Careers Coach role and is seen as an important part of their CPD as a guidance worker.

The process of reflection enables Coaches to reflect on many aspects of APP which include the skills involved, application of theory, the helping relationship and introducing new and emerging theories and practices like motivational interviewing. The medium of telephone guidance offers benefits to the reflective process as Coaches are able to listen to a recording of any call they take, stopping and starting the call as necessary to reflect upon elements of practice and this enriches the reflective process.

Mentoring

Clutterbuck and Megginson (1999, p.3) define mentoring as ‘off-line help by one person to another in making significant transitions in knowledge, work or thinking.’ The sessions provide space for self-reflection and feedback from mentors on potential ‘blind spots’ (Egan, 2007) in relation to practice, often critical for development. Quality Coaches assess the call in relation to the CAS call Quality Framework, discussed below. In this way mentoring supports several elements of APP including: application of theory; ethical considerations; interview skills; the impact of practitioner thoughts, feelings or assumptions on practice; use of the voice and the quality of the helping relationship. The mentoring sessions can be seen to fulfil the three functions of supervision defined by Hawkins and Shohet (2007: 57) as: ‘educative’, in relation to supporting practitioner continuing professional development (CPD); ‘supportive’, through helping practitioners to manage their own feelings in relation to interactions with clients and ‘managerial’ in ensuring the standards of the organisation are met - in this case adherence to an agreed Quality Framework.

Mentoring can help to identify calls that are strong in certain areas such as building rapport or discussing decision-making. This in turn helps to shape and define APP as Careers Coaches can listen to examples of best practice in their individual development areas identified during mentoring sessions. Best practice calls are also used as examples for training new Coaches. Advanced practitioners can become peer mentors to new staff to discuss calls and share best practice. Telephone guidance supports mentoring uniquely in the ability to listen back to call recordings made in the least intrusive way available as there is no physical presence of an observer or visible recording equipment.

Skills/cluster groups

Quality Coaches design, facilitate and evaluate monthly cluster groups ensuring consistency across the service. The format used, encompassing different learning styles, may include research completed before the session, call listening and group work.

Cluster groups offer Coaches a safe, confidential environment to discuss, develop and review new and existing areas of expertise. Working as part of a team within tight time constraints can make it difficult to allow time to reflect and discuss practice with colleagues in everyday work. Cluster groups provide a forum to explore emerging issues in practice and discuss difficulties faced. They provide reassurance that the Coach is not alone through identifying solutions and sharing examples of best practice, inspiring colleagues to incorporate such insight into their work. Coaches can learn to challenge and are encouraged to try something new as part of the group; which can feel more supportive, avoiding the intensity of one to one sessions. Woods (2001: 30) described group supervision as ‘an opportunity to support each other in a direct and purposeful way’ and found it a useful method to develop understanding of theory and practice.

Cluster groups are a mechanism enabling those with less experience to tap into the knowledge of their more experienced colleagues, whilst shaking others from potential complacency of using tried and trusted methods. Topics addressed are in response to advisors’ requests, or areas identified by Quality Coaches which may be to build on or challenge Coaches’ knowledge base. New techniques and strategies are introduced to develop their toolkit, while providing a supportive environment to enhance skills and confidence in responding to the shifts in client and policy expectations.

Electronic portfolio

A multi-media environment that places large numbers of people in one setting facilitates the provision of formal development events for peer groups. However, in contrast to this, some advisers report feelings of isolation and remoteness from colleagues. There is an element of
constraint posed by the telephone system, and restricted mobility necessitated by this, together with unpredictability of call flow, makes informal exchange of views between advisers problematic.

An adviser e-portfolio has the potential to ameliorate these feelings. The immediacy of the medium allows advisers to utilise unpredictable downtime between calls and presents ‘a potentially powerful tool for the development of reflective practice’ (Bimrose et al., 2007: 305). It is used to record written reflections on practice, either privately or viewable by other advisers, and to capture and reflect on what is learnt from CPD activities, enabling sustained discussion with peers online. The e-portfolio supports APP by facilitating debate on ethical practice, emerging new theory and putting theory into practice. Approximately half of current topics on the forum are within these categories, the remainder being primarily the sharing or seeking of knowledge of careers or career planning and management.

It should be noted that the e-portfolio does not cater to everyone’s tastes or learning style: approximately 40% of advisers do not contribute to discussion forums or maintain a publicly-visible diary. However, an internal survey in 2008 reported that advisers gained benefit from reading the reflections of others who used the e-portfolio, rather than recording their own. For those who choose to use it, the e-portfolio provides a channel for practitioners to share understanding of theoretical principles, something that Kidd et al. (1994) observed there was little opportunity for. It also provides a means of knowledge-sharing and development of own practice.

Quality assessment framework

A Quality Framework was developed by the International Centre for Guidance Studies (iCeGS) for learndirect in 2008. The Framework has been integrated within the development of the CAS since 2008. The Framework is used in two ways, externally and internally. It is used to evaluate the effectiveness of the service on behalf of the LSC annually. It is also used regularly by CAS coordinators, managers, Quality Coaches and others within the CAS to support the delivery of services. The Framework is used as a basis for the CAS monitoring systems supported by Quality Coaches. Typically it is used within the CAS to analyse recorded calls, to give feedback to Careers Coaches and to develop training – these aim to establish a high level of APP.

The framework has nine quality dimensions, which cover the aspects of the whole advice and guidance intervention, from greeting, to the appropriate level of advice, guidance and information given by the Coach, to call closure. Within each dimension there are desired outcomes which relate to each: in all there are 24 desired outcomes for the assessment of quality in practice. Each desired outcome is supported by examples of good practice. There is a tiered grading scale which is used to assess the practice of Coaches, from outstanding, to good to inadequate. In the external assessment of a large sample of telephone calls during 2008/2009 each dimension was considered against this four point scale. The framework that has been developed is a highly effective device to identify excellent practice in separate dimensions, as well as providing an indication of areas of relative weakness that can be addressed by training. However in a new and fast developing service criteria for judging service excellence may need revision over time. To date the Quality Framework has been used over a two year period.

Levelling in telephone guidance

The tools of levelling at CAS are the Quality Assessment Framework and an internal system of call scoring. Levelling is a process whereby Quality Coaches and coordinators reach a common understanding of performance levels within call scoring, thus supporting not only standardisation but also integration of theory into APP. As the service develops beyond the structural and technical, practitioners and others can debate the economics of APP at a distance and the value of coaches’ in-situ decision making. Levelling relies on a group analysis of a recorded call. Quality Coaches and service coordinators negotiate expectations of performance in relation to the challenges that the caller’s situation brings. ‘Levellers’ have different levels of knowledge, preferences and opinions about what is effective. The process is thus a diplomatic discussion of what a service values but also feels is practicable.

How can these parties agree on what is ‘outstanding’ or APP? The question is trickier than it may seem. Firstly, it is arbitrary. Where the bar is set is based on the economy of the resource, for example how much CPD coaches have, and the context of the client market, including how callers come to the service. Essentially, it is group goal setting in context. To be too aspirational can create a gravity towards the bottom of the scale, demoralising Coaches. It can be a real struggle of empathy for ‘levellers’ to imagine not knowing something and recognising the ‘clunkiness’ (Hambly, 2009) in a Coach’s attempts to put theory into practice. Equally to be too realistic can stunt the growth of more ambitious approaches.

Reflective practice is a key counterpoint to issues of assessment. Coaches, informed by a wider range of theory, increasingly make decisions that cannot be heard. For example, Hodkinson (2008) highlights that matching a person to a career opportunity is a flawed assumption but is embedded in public consciousness. Coaches, in practice, face dilemmas of the kind: shall I challenge this assumption or is it reasonable for the caller to believe this at this time? The dilemmas of Coaches inevitably become the speculations of levelling sessions.

Conclusions

Telephone guidance is a new and valuable service to support career decision making. In a decade the CAS has been a leader in the development of this service, creating an internationally recognised service with advanced tools
and processes for identifying and developing high level skills of its practitioners. Its highly trained professional staff routinely use these tools and processes, primarily as a means to develop and encourage advanced practice, rather than ‘shame’ relative poor practice. However, products of assessment, like recorded calls, are not sufficient to determine APP. A dialogue between assessors, Quality Coaches, and Coaches is needed to establish the thinking behind in-situ decisions, this is particularly true of the use of intuition within practitioner and client interactions. It would appear that if APP is to flourish, tools of reflection and sensitive mentoring are essential. There is also a quantifiable cost of providing evaluative processes.

In conclusion, the understanding of APP in telephone guidance has greatly developed through the work of the CAS. The tools and processes described have provided clear benefits to activities which support CPD: they enrich the reflective process to further the development of the advanced practitioner’s skills. These tools will continue to develop, advancing the concept of what APP is in the wider advancement and careers services.

References


