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## Towards an understanding of the measurement of individual progression in adult guidance

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**Towards an Understanding of the Measurement  
of Individual Progression in Adult Guidance**

**By  
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**Thesis Submitted to WIT for the Award of  
Doctorate of Philosophy**

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## **Declaration**

The author hereby declares that this thesis is entirely her own work. No element of the work described in this dissertation has been previously submitted for any degree in Waterford Institute of Technology, or in any other institution.

**Lucy Hearne**

This dissertation is dedicated to my parents, James and Anne Hearne, who have continuously encouraged and supported me in the paths I have chosen.

There is guidance for each of us, and by lowly listening,  
we shall hear the right word.

Ralph Waldo Emerson

As you set out for Ithaca  
hope your road is a long one,  
full of adventure, full of discovery.....

Constantine P. Cavafy

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## Glossary

AEGA	Adult Education Guidance Association
AEGI	Adult Educational Guidance Initiative
AGMS	Adult Guidance Management System
ALI	Adult Learning Inspectorate (UK)
AONTAS	National Association of Adult Education
BERA	British Educational Research Association (UK)
BPS	British Psychological Society
CAO	Central Applications Office
CEC	Commission of the European Communities
CEDEFOP	European Centre for the Development of Vocational Training
CeGS	Centre for Guidance Studies (UK)
CICA	Career Industry Council of Australia
CIMO	Centre for International Mobility (Finland)
CMS	Caseload Management System
CRAC	Careers Research and Advisory Centre (UK)
CRWG	Canadian Research Working Group
CSO	Central Statistics Office
DfES	Department for Education and Skills (UK)
DEL	Department of Employment and Learning (UK)
DES	Department of Education and Science
DEE	Department of Enterprise and Employment
DETE	Department of Enterprise, Trade and Employment
EFILWC	European Foundation for the Improvement of Living and Work Conditions
EGSA	Educational Guidance Service for Adults (Northern Ireland)
ELGPN	European Lifelong Guidance Policy Network
ENQA	European Association for Quality Assurance in Higher Education
ENTO	Employment National Training Organisation (UK)
EQIA	Equality Impact Assessment
ETP	Equality Through People
ESRI	Economic and Social Research Institute

EU	European Union
FÁS	The National Training and Employment Authority
FE	Further Education
FEU	Further Education Unit (UK)
Forfás	National Policy Advisory Group for Enterprise and Science
GOI	Government of Ireland
HE	Higher Education
HEEU	Higher Education Equality Unit
IAG	Information, Advice and Guidance
IAEVG	International Association for Educational and Vocational Guidance
IATI	Institute of Accounting Technicians Ireland
ICCDPP	International Centre for Career Development and Public Policy
iCeGS	International Centre for Guidance Studies (UK)
ICG	Institute of Career Guidance (UK)
IER	Institute of Employment Research (UK)
IES	Institute for Employment Studies (UK)
IGC	Institute of Guidance Counsellors
LES	Local Employment Service
MEE	Ministry of Employment and Economy (Finland)
MORI	Market and Opinion Research International
NAEGA	National Adult Educational Guidance Association (UK)
NALA	National Adult Literacy Agency
NCC	National Competitiveness Council
NCGE	National Centre for Guidance in Education
NDP	National Development Plan
NES	National Employment Service (FÁS)
NESF	National Economic and Social Forum
NGF	National Guidance Forum
NIACE	National Institute of Adult Continuing Education (UK)
NLSC	National Learning and Skills Council (UK)
NOICC	National Occupational Information Coordinating Committee (US)
NQAI	National Qualification Authority of Ireland
OECD	Organisation for Economic Co-Operation and Development

OSCAIL	Irish Distance Learning Body
OUP	Open University Press
PES	Public Employment Service
PPF	Programme for Prosperity and Fairness
PSI	Psychological Society of Ireland
REGSA	Regional Educational Guidance Service for Adults
SRHE	Society for Research in Higher Education (UK)
STF	Systems Theory Framework
TEAGASC	Irish Agriculture and Food Development Authority
TQM	Total Quality Management
UCC	University College Cork
UDACE	Unit for the Development of Adult Continuing Education (UK)
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VEC	Vocational Education Committee
VET	Vocational Education and Training
VTOS	Vocational Training Opportunities Scheme
WIT	Waterford Institute of Technology

## **Abstract**

The overall aim of this research study is to consider the development of a best practice framework for the longitudinal tracking of individual progression in the Irish Adult Educational Guidance Initiative (AEGI). A specific focus of the study is the analysis of the contribution of the client to the design of a quality longitudinal tracking system in adult guidance practice.

In attempting to answer the main research question of how progression is measured in the current longitudinal tracking system in the AEGI the study examines a number of specific issues. These issues relate to definitions, rationale and methodologies for measuring outcomes within the context of the three OECD public policy goals of lifelong learning, labour market and social equity.

The study explores claims that current methods using positivistic approaches to measure outcomes in guidance are inadequate. A critical constructivist approach was adopted to examine the discourse of three of the key stakeholders involved, the client, practitioner and policy-maker. A bottom-up case study methodology contextualises and explains the subjective experiences of a number of clients over a longitudinal time-frame.

The mapping of the various discourse positions finds both convergence and divergence on the topic of measuring long-term progression in adult guidance. The findings show that outcome evaluation is a complex and contested issue. The current emphasis of policy to achieve hard, tangible outcomes obviates the measurement of a broad range of softer, intangible outcomes that capture the personal progression of clients.

This research study can contribute to a gap in knowledge in Irish guidance policy and practice through its consideration of the client's contribution to the design of a quality longitudinal tracking system in adult guidance. The research concludes with a number of recommendations in relation to outcome evaluation and a call for methodological pluralism in evidence-based research in the field.

## **Chapter 1: Introduction**

### **1.0 Introduction**

This chapter introduces the research problem by providing an overview of the topic under investigation within a practical and theoretical context. It presents a justification for the current research study, describes the aim and objectives of the research, and sets out the plan of the thesis.

### **1.1 Overview of Research Topic**

The overall aim of this research is the consideration of a best practice framework for the longitudinal tracking of individual progression in the Irish Adult Educational Guidance Initiative (AEGI). This requires the examination of the long-term measurement of progression in the current client tracking system used in the AEGI. At present, the Department of Education and Science (DES) employs a top-down, quantitative approach to monitor clients' progression in terms of education and employment attainment in the AEGI. Whilst these hard, tangible outcomes are highly relevant, greater consideration also needs to be given to softer outcomes such as attitude, motivation and self-confidence which encapsulate the client's personal progression (Bimrose et al, 2006a:68).

As the focus of the research is primarily methodological, the study aims to explore claims that current methods using positivistic approaches to measure long-term outcomes are inadequate as they disregard the subjective experiences of clients. It is now being argued that the privileging of hard outcomes over the softer outcomes of personal development are insufficient measures of the impact of guidance on clients (Maguire & Killeen, 2003:5). The use of qualitative approaches are now advocated to provide a greater understanding of the life-changing effects of interventions on individuals and the complex nature of progression (Maguire & Killeen, 2003:5; McGivney, 2002:20). In particular, it is claimed that softer measures can be accommodated in longitudinal client research to enable a longer-term analysis of a broad range of outcomes (Maguire & Killeen, 2003:18; Hughes et al, 2002:5).

However, within a broader international context, the DES's pursuit of education and employment outcomes is synonymous with the achievement of the three public policy goals of lifelong learning, labour market and social equity proposed by the Organisation for Economic Co-Operation and Development (OECD). In Ireland, as elsewhere, the achievement of the European Union's Lifelong Learning policy goals has influenced provision in the adult education and adult guidance sectors. The formal implementation of the AEGI in 2000 evolved from recommendations in the DES's *Learning for Life: White Paper on Adult Education* (2000). Within the context of lifelong learning, quality lifelong guidance is now viewed as "central to constructing a competitive, knowledge-based economy, advancing active employment, welfare and social inclusion policies" (Sultana, 2004:13). These policy objectives have an impact on adult guidance in Ireland as there is a prerequisite for guidance services to monitor long-term outcomes.

From a lifelong guidance perspective, it is now becoming essential that quality assurance (QA) systems are developed which meet the needs of clients who have to negotiate their learning and career paths across the lifespan (Council of the European Union, 2008:6). One of the key objectives of the National Guidance Forum's *Guidance for Life: An Integrated Framework for Lifelong Guidance in Ireland* (2007a:5) is to "urgently harness and proactively manage the wealth of existing guidance resources and agree mechanisms for measuring relevant and realistic outcomes". This will require the use of appropriate evaluation methods across the entire guidance sector in Ireland.

Although the advancement of adult educational guidance is still relatively new in Ireland, it is evident that appropriate mechanisms are now required in the AEGI services to evaluate long-term outcomes. Such propositions reflect the current debate on outcome measurement and the development of performance indicators and benchmarks in career guidance nationally and internationally. The next section will position the research problem within the broader theoretical context of the literature and research on the topic in the field.

## 1.2 Defining the Research Problem in the Theoretical Context

This section will position the research problem in the theoretical context. A more detailed analysis of the definitions, concepts, themes and issues related to the topic are addressed in the two literature chapters (3 and 4). In the attempt to measure individual progression effectively through longitudinal tracking several issues are evident. These issues concern:

- (i) Definitions of progression
- (ii) Types of outcomes for measurement
- (iii) Rationale for measuring outcomes
- (iv) Methodologies for the measurement of outcomes

### 1.2.1 Definitions of progression

The meaning of progression is contested in the fields of education and career guidance. McGivney (2002:11) states that “progression is one of the (many) words used in education literature and policy documents which has no universally accepted definition”. She argues that there is an overemphasis in education on linear progression to give value and meaning to learning at the expense of those adults whose progression takes place in extremely small steps (p.14). Furthermore, the development of personal skills, as a result of learning, can also mean personal, social, economic and educational progression that has life-altering effects on the individual (McGivney, p.20).

It is argued that the acquirement of a range of softer, intangible skills such as interpersonal, organisational, analytical and personal skills cannot be measured directly or tangibly (Dewson et al, 2002:2). Dewson et al. state that the achievement of these softer outcomes can be viewed as the *distance travelled* in an individual’s developmental progress towards the attainment of harder, tangible outcomes of qualifications and employment. In the context of this study, distance travelled refers to the different starting points people have for their progression journey. The distance travelled can involve improved clarity, increased self-confidence and motivation, and greater self-awareness of

skills, abilities and preferences (Bimrose et al, 2006a:68). However, Bimrose et al (2008:6) argue that the longitudinal measurement of the impact of guidance needs to reflect the distance travelled by clients from a process perspective as well as its quantifiable outcomes.

Current Irish policy discourse represents educational progression as a linear, vertical process of upward mobility from one level of qualification to the next level (NQAI, 2003:5). This viewpoint of progression is challenged as the process can be cyclical, zig-zag and non-linear as transitions recur throughout the life span and are multiple in nature (McGivney, 2002:15). In the career realm, one's career progression can take place laterally as well as vertically (iCEGS, 2008: 31; Watts, 1999a:2). Transitions between education, training and work are becoming less linear which now requires individuals to manage their skills development throughout the lifespan (Sultana, 2008:16; Savickas, 2000:58). Furthermore, Maguire & Killeen (2003:5) contend there is a difficulty in gauging the true impact of career guidance if studies do not account for the 'life-changing effects' of interventions, which may or may not be as easily observable or tangible as the take-up of learning opportunities or employment.

Ultimately, the progression process involves a range of variables. These variables can include age, gender, decision-making, attitude, motivation, attributes, expectations, goals, barriers, support systems, mobility opportunities and economic contexts. In addition, an understanding of the progression process requires a scrutinisation of the structural and personal obstacles encountered by adult learners. It is evident that adults continuously experience institutional, economic and specific personal barriers that hinder their access, retention and progression in education and into employment (Bimrose et al, 2008:5; Hearne, 2005:12; Lynch, 1999:201).

### *1.2.2 Types of outcomes for measurement*

The measurement of progression is part of a wider debate concerned with quality assurance (QA) and the evaluation of the long-term outcomes of guidance interventions.

Outcome assessment is a set of thinking and action processes used to determine the nature of change for individuals following an intervention process such as guidance, as well as to assess the worth of the professional activity (DePoy & Gilson, 2008:174). In career guidance discourse there is a divergence on the terminology used and value given to some outcomes over others. Policy-makers view quality outcomes quantitatively or objectively focusing on education and employment outcomes, whereas practitioners view quality outcomes qualitatively or subjectively prioritising satisfaction and the personal development of the individual (Savickas, 2001:1). Specifically, policy-makers are interested in ultimate outcomes which rely heavily on demonstrations that the effects of guidance “on individuals eventually impacts on labour market processes” (Kidd, 2006:86). Whilst some may argue that the economic outcome is imperative to ensure competitiveness, an understanding of the softer outcomes achieved by clients that lead to this ultimate outcome needs further consideration in policy-making.

Debates on the issue of outcome measurement highlight a lack of consensus on common methods and standards in practice. It is now recognised that improvements are needed in both quantitative and qualitative monitoring. Hughes & Gration (2006:12) state that data collection quite often reflects the particular performance targets and QA frameworks used by the provider. Increasingly, QA in guidance is conceptualised in terms of *inputs*, *processes* and *outcomes*. Outcomes or outputs are defined in the form of predetermined performance targets or indicators (Bimrose et al, 2006b:5; den Boer, 2005:12). However, Bimrose et al (2004:11) argue that the focus on performance targets may neglect the complex inter-relationships and variables that exist including personal circumstances, individual contexts, and type and duration of guidance intervention that impact on client outcomes.

### *1.2.3 Rationale for measuring outcomes*

The development of quality standards and the evaluation of the long-term outcomes of guidance intervention is now a major public policy issue. Within a lifelong learning context “the development of indicators and benchmarks are key elements of evidence-

based policy-making and the monitoring of progress essential to the Lisbon process” (Commission of the European Communities, 2007:3). However, as evaluation provides the empirical ‘power’ to guide and justify professional programmes it is controversial in its purpose, the power relationships it manifests, and the manner in which it should be conducted (DePoy & Gilson, 2008:16; Killeen,1996a:331). Two polarised systems of evaluation reflect these contentious issues in adult guidance practice.

The ‘top-down’ judgmental approach which involves formative and summative evaluation can be viewed as an exercise of power. If the rationale is one of *cost-benefit*, rather than *cost effectiveness*, there may be a danger that Irish adult educational guidance provision will become dependent on attaining suitable economic outcomes to ensure funding in the future. In the United Kingdom (UK), the focus on cost-benefit has already led to increased levels of accountability as adult guidance services now operate within a target-driven culture. In contrast, a ‘bottom-up’ democratic approach proposes the inclusion of all relevant stakeholders to determine the information required in outcome evaluation (Kelly, 2004b:533; Killeen, 1996a:33). This would include the active contribution of guidance ‘users’, the clients in the process (Plant, H, 2005:1; Henderson et al, 2004:15; OECD, 2004a:8). Nonetheless, despite the call for the involvement of citizens in public policy development, the ‘voice of the user’ is still very much in its infancy in current adult guidance practice (Plant, H, 2005:1).

#### *1.2.4 Methodologies for the measurement of outcomes*

Finally, there is a general consensus across the discourses in the field that evidence-based research is crucial for evaluating the long-term outcomes of guidance. Historically the positivist paradigm which has emphasised replication and generalisability has been dominant in evaluation research in guidance. Concerns are now being expressed about the theoretical limitations of quantitative methods which seek quantifiable and easily measurable outcomes. Alternative methodologies are now being recommended, including interpretive or constructivist paradigms, that reflect the client’s subjective and contextual experiences and the range of outcomes achieved (Kidd, 2006:86; Savickas,

2000: 59). As a range of factors influence individual career choice and effect outcomes, guidance is often embedded in other contexts, for example, learning provision, employer/employee relationships and redundancy supports, which may not emerge through quantitative analysis (Sultana, 2008:47; Bimrose et al, 2006b:8). Therefore, methodological pluralism is advocated in the analysis of the broad range of outcomes experienced by clients over a long-term period.

In particular, longitudinal studies have the capacity to measure each type of effect allowing conclusions to be drawn about the progressive impact of interventions and the complexities of adult career trajectories (Bimrose et al, 2008:v; Kidd, 2006:86). At present, there are no European level indicators or benchmarks on guidance, and improving quantitative and qualitative monitoring is an issue currently under examination (Hughes & Gration, 2006:9). However, in practice, career guidance services face major challenges if they are to implement strategies for measuring benefits as part of a presumptive process rather than an empirical one at policy level (Herr, 2001:1).

Therefore, this research study will explore the possibility that the design of quality longitudinal tracking systems can be further advanced from the empirical data gathered from clients on a whole range of hard and soft outcomes. This approach is in contrast to the presumptive process adopted by policy-makers in their quest for hard impact measures in the evaluation of guidance interventions. A bottom-up case study approach will focus on the voice of the client in the explication of the complexity and subjective nature of individual progression. The research will be underpinned by a critical constructivist methodology to interpret the current discourses on the evaluation of outcomes in career guidance. A critical interpretation of the unconscious processes, ideologies and power relations in these discourses will be used to dispute the dominance of the economic discourse which privileges hard outcomes over soft outcomes in the measurement of long-term progression (Alvesson & Skoldberg, 2000:144).

### **1.3 Justification for the Research Study**

As discussed in 1.2, there is now a call for evidence-based research on inputs and outcomes to inform career guidance policy and practice. Despite the strong research tradition in career guidance, the focus has been upon theories, tools and methodologies which have been of limited help to policy-makers (OECD, 2004b:126). Similarly, Whiston & Oliver (2005:184) stress:

the dearth of current research on career counseling and the importance of more empirical investigations in all three of the traditional intervention research areas (i.e. outcome, process and the interaction between process and outcome).

(Whiston & Oliver, 2005:184)

This observation reflects deficits in adult guidance research in Ireland over the last number of years and the need for research into the three intervention areas (Hearne, 2005:23; McNamara, 1998:5). In terms of outcome research, the impetus for this current study was an earlier quantitative study I conducted from 2004-2005 for one of the AEGI services, the Regional Educational Guidance Service for Adults (REGSA), in the Waterford Institute of Technology (WIT). The context of the current study is discussed in Chapter 2.

Since its inception in 1998, REGSA has been pivotal in providing educational guidance support to a large adult population in the South-East of Ireland. Prior to the 2004-2005 study, I had worked for three years in REGSA as an adult guidance practitioner where I provided educational and career guidance support to a diverse range of adults. By 2004, no formal system for tracking client progression had been implemented in REGSA, nor had it been requested at a national level by the DES. Essentially, there was a lack of consistency on tracking across the AEGI services as each guidance service operated within its own boundaries of provision. On a professional level I have a strong interest in understanding the influence of guidance interventions on client's lives. I believe the long-term tracking of clients' progression and the evaluation of provision is a necessary element of best practice that requires a strategic approach within the AEGI. Sultana (2008:49) asserts that evaluation on an irregular, ad-hoc basis fails to "generate a self-

critical culture and implement ongoing evaluation procedures that are the basis of most QA systems”.

The 2004-2005 REGSA study brought to light this lack of consistency in the AEGI. In 2002, the OECD Country Review identified the absence of established systems to track client progression and monitor long-term guidance service use in the sector overall. It is now recognised that quality improvement in guidance provision needs to be achieved through qualitative and quantitative methods of data collection and monitoring (NGF, 2007a:21). At a policy level, in assuring quality of provision for citizens, guidance services are recommended to adopt a culture of continuous improvement through “regular citizen feedback to achieve and provide opportunities for staff for continuous training” (Wannan & McCarthy, 2005:13). This has implications for the AEGI services as the long-term monitoring of progression will require sophisticated mechanisms to track, evaluate and record outcomes at a local and national level. However, the development of a wide range of performance indicators to assess true progression still has to be achieved not only within the AEGI, but also at a national and European level.

As there is work to be done on the development of performance indicators to evaluate outcomes in adult guidance this research study can contribute to such activities. The earlier REGSA study also highlighted some of the methodological problems inherent in the longitudinal tracking of outcomes. Specifically, a quantitative approach was limited in its capacity to capture the subjective experiences of clients. It was evident that the clients’ experiences required further illumination to understand the multi-faceted nature of individual progression. An interpretive approach in this current study seeks to challenge the dominance of the positivist paradigm to measure outcomes by explicating the concept of progression from the client’s perspective. This study is closest to that of Bimrose et al’s (2008) recent five-year case study analysis of adult career progression and advancement in England. From an Irish perspective, the contribution of this research will be the consideration of the client’s role in the development of a quality longitudinal tracking system in adult educational guidance provision.

Furthermore, the research study will contribute to professional practice by examining the role of the guidance practitioner-researcher carrying out evaluation research in the field. As fieldwork is characterised by intimacy, shared experience, empathy and confidentiality it will necessitate a closeness to the clients involved in the study (Patton, 2002:48). This closeness raises specific issues for practitioner-researchers in guidance settings. These critical issues relate to power relations, ethics and reflexivity in the methodology and methods used to address the research problem. This research will provide the opportunity to reflect on these and other emergent issues related to career guidance research in Ireland.

## **1.4 Aim and Objectives of Research Study**

### *1.4.1 Aim*

The overall aim of this research study is to consider the development of a best practice framework for the longitudinal tracking of client progression in the Irish Adult Educational Guidance Initiative (AEGI).

### *1.4.2 Objectives*

- 1) To examine definitions of ‘progression’ from the standpoint of three relevant stakeholders, clients, guidance practitioners and policy-makers, through a multiple method approach.
- 2) To review the relevant literature in the field of adult guidance theory, policy and practice for an in-depth understanding of the discourse on the research topic.
- 3) To gather the narratives of a number of adults to ascertain the outcomes of guidance intervention over a long-term period.
- 4) To observe how individual progression is currently measured in client data management systems in adult guidance contexts.
- 5) To critically examine the key methodological issues involved in the measurement of individual progression through longitudinal tracking in adult guidance.
- 6) To explore the contribution of the guidance ‘user’, the client to the design of a quality longitudinal tracking system in the AEGI.

## **1.5 Plan of the Thesis**

The structure of this thesis is as follows:

**Chapter 1** introduces the research study, positions the research problem within its practical and theoretical contexts, offers a justification for the research and describes the aim and objectives of the study.

**Chapter 2** provides a contextual overview of the research in terms of adult guidance policy and practice, the background of the study and my own position as a practitioner-researcher within the context of the research.

**Chapters' 3 and 4** reviews previous published research and the theory in this area, thereby providing a context for the study.

**Chapter 5** deals specifically with the methodological framework underpinning the research design.

**Chapter 6** outlines the methods of data collection and analysis used in the research design.

**Chapter 7** provides a reflexive account of the multiple methods of data collection employed in the fieldwork stage of the research.

**Chapter 8** discusses the methods of analysis and the overall findings from the primary and secondary data sources in the research.

**Chapter 9** presents a critical interpretation of the data in the context of previous research providing greater illumination on the topic under investigation.

**Chapter 10** concludes the research study by providing an overview of the findings in the context of the aim and objectives of the study. The chapter discusses the strengths, weaknesses, opportunities and threats of the research and puts forward recommendations arising from the study. It also provides a reflexive summary of the research process.

## **1.6 Conclusion**

This chapter has introduced the research problem by providing an overview of the topic within a practical and theoretical context. It has offered a justification for the research, described the research aim and objectives, and provided a plan of the dissertation. Chapter 2 provides a more in-depth contextual background to the research study.

## **Chapter 2: Contextual Background**

### **2.0 Introduction**

This chapter contextualises the research study from three aspects. It provides an overview of the position of Irish adult guidance policy and practice in the broader context of European and international developments. It describes the location and background of the research topic, and addresses my own position as a practitioner-researcher in the context of the study.

### **2.1 Policy and Practice Context**

The international review of career guidance policies indicates that policy-makers in all countries clearly regard career guidance as a public good (Watts & Sultana, 2004:1). The development of adult educational guidance in the Republic of Ireland (ROI) has been and still remains to be influenced by education policies at a national, European and international level. The OECD (2004b:17) stresses that countries now need “to work towards the development of lifelong guidance systems”. Adult guidance is now firmly positioned within this lifelong guidance context. It is now expected to help both individuals as well as serve the three OECD public policy goals of learning, labour market and social equity. Furthermore, adult guidance now has to operate within the context of ageing societies that require later retirement ages and more flexible transitions to retirement (OECD, 2004a:7).

In the Republic of Ireland (ROI), as elsewhere, the achievement of the policy goals of the European Education and Training (2010) programme has influenced Irish adult education policy which includes adult educational guidance provision. In 2000 large scale investment in the adult education sector was identified as a necessity in Irish education policy. The development of this governmental position and the establishment of a national policy on lifelong learning have been influenced by organisations such as the European Commission, OECD and UNESCO (DES, 2000:54).

The necessity for individuals of all ages to safeguard their career paths in the face of growing globalisation is now at the heart of national and European guidance policy. The recent *Council Resolution on Better Integrating Lifelong Guidance into Lifelong Learning Strategies* (Council of the European Union, 2008:3) urges European countries to “strengthen the role of lifelong guidance within national lifelong learning strategies in line with the Lisbon Strategy”. One of the Resolution’s guiding principles to support the lifelong career transitions of citizens is the development of quality assurance in guidance (p.4).

Although gaps and weaknesses have been found in quality assurance approaches in European provision, it is important that quality standards are developed that reflect national guidance systems (Sultana, 2004:97). Sultana states that quality standards “can serve as criteria for establishing performance targets and for organizing service evaluation and inspection” (p.96). The development of indicators and benchmarks in guidance are key elements of evidence-based policy-making and the monitoring of progress essential to the Lisbon process (CEC, 2007:3). However, “while much of the existing evidence is positive in nature, policy-makers have sometimes used the lack of hard evidence to support limited investment in services” (OECD, 2004b:127).

The OECD (2004b:127) contends that policy-relevant research now needs to focus on the long-term effect of career guidance, that is, the outcomes of the intervention. In particular, the evaluation of the economic benefits of information, advice and guidance (IAG), allied to the development of accountability models in career guidance services, is becoming increasingly important to justify funding levels within the sector (Sampson et al, 2004:268; Hughes et al, 2002:4).

In Ireland, the OECD Country Review (2002:19) of career guidance policies identified a specific weakness between policy and practice through the absence of established systems to track client progression and monitor long-term guidance service use. This included the adult educational guidance sector. Since the review, operationalisation of

the Irish National Guidance Forum (NGF) between 2004 and 2006, and its subsequent policy document *Guidance for Life: An Integrated Framework for Lifelong Guidance in Ireland* (2007a) has been seen as a significant step towards achieving the vision of lifelong guidance provision in Ireland. Furthermore, the development of quality standards across the Irish guidance sector, including adult educational guidance, is now being addressed through the NGF's *Quality in Guidance* (2007c) guidelines.

However, in a broader context, the OECD puts forward two key challenges for the organisation and delivery of career guidance services in implementing lifelong learning and labour market policies. They are:

- 1) Move from an approach that emphasizes assistance with immediate occupational and educational decision-making to a broader approach that also develops people's ability to manage their own careers: developing career planning and employability skills; and
- 2) Find cost-effective ways to expand access to career guidance throughout the lifespan.

(OECD, 2004b:138)

Such challenges now face policy-makers in the design of national lifelong guidance systems and practical career guidance programmes.

### *2.1.1 Career guidance blueprints and frameworks*

Since the nineties a number of countries have introduced national career guidance blueprints and frameworks to help individuals build their career competencies across the lifespan. The OECD recognises that:

Career guidance quality standards can also focus upon outcomes by specifying, for example the types of skills and competencies that career guidance should try to achieve.

(OECD, 2004b:135)

The three countries that have been at the forefront of such developments are Australia (Miles Morgan Australia Pty, Ltd. 2009), Canada (National Life/Work Centre, 2000) and the United States (NOICC, 1989). These blueprints and frameworks emphasise career development and career guidance provision in holistic, lifelong terms, rather than ad-hoc, fragmented and uncoordinated approaches that had previously been in existence.

One of the most recent blueprints is the Australian Blueprint for Career Development which has been based on the Canadian model. The Australian Blueprint aims to provide a framework that specifies the competencies and skills that all Australians need in order to build their careers over the lifecourse. The range of skills is explained thus:

As well as having the technical skills and abilities needed to work in a particular role, people also need the skills, knowledge and attitudes to make good career moves. The skills, knowledge, and attitudes people need to manage their own careers can be understood as a set of competencies that can be developed and strengthened over time.

(Miles Morgan Australia Pty, Ltd, 2009:1)

From a European perspective, the development of national guidance frameworks is more disparate as countries operate within their own national contexts. Nevertheless, some countries have begun to implement national quality standards. Denmark and Scotland are two examples and are discussed in more detail in Chapter 4.

In Ireland, the NGF's *Guidance for Life: An Integrated Framework for Lifelong Guidance in Ireland* (2007a) advocates a more comprehensive approach to delivery and quality standards across the guidance sector. It still remains to be seen whether the policy recommendations in the document will materialise in practice.

### *2.1.2 Adult educational guidance in Ireland*

In general, adult guidance provision in Ireland encompasses a wide spectrum including formal and non-formal education, private practice and the public employment service (FÁS). This research study focuses specifically on adult guidance provision within the AEGI.

Since the establishment of the National Centre for Guidance in Education (NCGE) in 1995 a number of significant developments have contributed to the inception and integration of adult guidance in the Republic of Ireland. The timeline of these developments is displayed in *Table 2.1*.

*Table 2.1: Policy and practice timeline*

**Timeline of significant developments in adult educational guidance in Ireland  
(1995-2009)**

- 1995: Establishment of the National Centre for Guidance in Education (NCGE)
- 1996: NCGE hosts Irish Presidency Conference *Guidance in the Information Society*
- 1998: Education Act (1998)
- 1998: NCGE input into the Department of Education & Science (DES) Green Paper *Guidance in Adult and Continuing Education*
- 1998: DES Green Paper on adult education published
- 1998: Establishment of Regional Educational Guidance Service for Adults (REGSA), Waterford Institute of Technology (WIT)
- 1999: Qualifications (Education and Training) Act
- 2000: DES White Paper *Learning for Life: White Paper on Adult Education* published
- 2000: Government of Ireland *National Development Plan* (NDP, 2000-2006)
- 2000: Education (Welfare) Act
- 2000: Formal implementation of Phase 1 of Adult Educational Guidance Initiative (AEGI), REGSA included in Phase 1.
- 2001: Phase 2 of AEGI
- 2001: Establishment of the Adult Educational Guidance Association (AEGA)
- 2001: Establishment of the National Qualification Authority of Ireland (NQAI)
- 2002: Phase 3 of AEGI
- 2002: OECD Review of Career Guidance Policies: Ireland Review published
- 2002: Department of Enterprise, Training & Employment (DETE) *Report of the Taskforce on Lifelong Learning*
- 2003: Establishment of Interdepartmental Committee on Lifelong Learning (DES & DETE)
- 2003: NQAI *National Framework of Qualifications* published
- 2004: Irish EU Presidency Conference on *Lifelong Guidance: Harmonising Policy and Practice*
- 2004: Establishment of Irish National Guidance Forum (NGF)
- 2004: DETE *National Employment Action Plan*
- 2005: Formative Evaluation of Phases 1-3 of AEGI conducted by SPSS, Ireland Ltd.
- 2005: Phase 4 of AEGI
- 2006: NCGE celebrates 10 years in existence and publishes *NCGE in Support of Guidance: Policy and Practice, 1995-2005*.
- 2007: NGF *Guidance for Life: An Integrated Framework for Lifelong Guidance in Ireland*.
- 2007: AEGI's total number of nationwide services stands at 39
- 2008: Summative evaluation of AEGI. Report still to be circulated in the public domain.

In terms of adult guidance, the most noteworthy development has been the formal establishment of the AEGI in 2000 following recommendations in the DES's policy document *Learning for Life: White Paper on Adult Education* (DES, 2000). The structure of the AEGI was heavily influenced by the longer established adult guidance

sector in England, which itself has only recently begun a process of redevelopment in the form of the new Adult Advancement and Careers Service.

The AEGI, which was introduced on a phased basis between 2000 and 2007, was funded under the Government of Ireland's *National Development Plan* (NDP, 2000-2006; 2007-2013). The AEGI is managed by the NCGE on behalf of the DES. Currently, there are thirty-nine AEGI services situated in the twenty-six counties providing guidance to clients from specific target groups, (see *Appendix A* for a national map of AEGI provision). The target groups are clients from Vocational Training Opportunities Scheme (VTOS), adult literacy, and adult and community education programmes. In 2006, clients of the Education Finance Board and their adult offspring were included as an additional client group (NGF, 2007a:36).

Over 30,000 individuals have accessed the AEGI since 2000 (NGF, 2007a:36). The majority of the AEGI services are managed by the Vocational Education Committees (VEC) in the further education sector. Only one service, the Regional Educational Guidance Service for Adults (REGSA) is situated in a third-level institute, the Waterford Institute of Technology (WIT). Nonetheless, all thirty-nine services are consistent in their provision of personal, educational and career guidance at pre-entry, entry, on-going and pre-exit stages (NCGE, 2006:9). In 2006, an extra one million euro was allocated to the AEGI budget by the DES. This allowed for the provision of twelve additional guidance counsellor positions in ten AEGI services which were successful in the tendering process.

Since 2000 the AEGI has undergone a series of developmental changes in line with the needs of the guidance services on the ground and the requirements of the NCGE and DES. This has included formative and summative evaluations. Scheerens et al (2003:12) explain that formative and summative elements are two-fold. Formative evaluation normally takes place during pilot-stages or the implementation of a programme in order to provide feedback and improve the process of implementation. Summative evaluation

is used to determine whether a programme has reached its objectives. In the AEGI, formative evaluation using quantitative methods was conducted on twenty-four services (Phases I to III) in 2005 (SPSS Ireland Ltd., 2005). A summative evaluation of the AEGI services using both quantitative and qualitative methods was conducted in 2008. The findings of this summative evaluation have still to be disseminated within the public domain and therefore cannot be commented upon here.

Scheerens et al (2003:4) argue that the main reasons for monitoring and evaluation in education are accountability, improvement and the regulation of outcomes. As part of their service level agreement with the DES all of the AEGI services have had their service delivery monitored through quantitative and qualitative methods on a quarterly basis. The data is captured on the AEGI's national adult guidance management system (AGMS). This type of 'systems level' Management Information System depends on statistics and administrative data to monitor progress (Scheerens et al, 2003:9).

Table 2.2 provides a conceptual framework of the three key functions of the AGMS from the perspectives of the DES/NCGE, the AEGI guidance services and the AEGI clients.

*Table 2.2: Overview of current AEGI monitoring and evaluation system*

<b>Programme</b>	<b>Adult Educational Guidance Initiative (AEGI)</b>		
Data Source	Adult Guidance Management System (AGMS)		
<b><i>Function:</i></b>	<b><i>Accountability</i></b>	<b><i>Improvement</i></b>	<b><i>Policy Outcomes</i></b>
<b>DES/ NCGE</b>	Monitoring Provision	Resource Management	Numbers Progressed
<b>Guidance Services</b>	Reporting of activities	Service Evaluation	Numbers Progressed
<b>Clients</b>	Numbers Serviced	Quality Assurance	Education/Employment (HO) Personal Development (SO)

*(Adapted from Scheerens et al's (2003: 8) model of monitoring and evaluation types in education)*

The AGMS was formally rolled out to all of the AEGI services in 2003 and has since undergone a number of further improvements. In 2005 the system was transformed from a “locally based database to a national online system” (McKenzie, 2008:8). Whilst this design upgrade involved all stakeholders, that is, staff from a number of services and the NCGE, it did not involve the clients of the AEGI. The major difference the AGMS has made to services is that the NCGE and the DES can now access statistical information at any time instead of waiting on results from quarterly reports. For ethical reasons the NCGE and DES do not have access to sensitive client information through this medium. Qualitative information is still sent to the NCGE and DES on a quarterly basis by services. As the AEGI has to address the Social Inclusion priority in the NDP, qualitative data includes information on outreach provision, gender equality and how services are accounting for their social inclusion priorities in their area (McKenzie, 2008:8).

However, client tracking to monitor both short-term and long-term progression has been ad-hoc and inconsistent across the AEGI services (Hearne, 2005:4). In 2005, only 54% of AEGI services used the national database and client surveys for client tracking (SPSS Ireland Ltd., 2005:18). Furthermore, 13% of services did not conduct client tracking. At the moment there is a lack of information on current client tracking activities across all thirty-nine services. At the beginning of this research study in 2005 client progression was defined in the AGMS as ‘ready for education’ and ‘ready for employment’. This has since changed and analysis of client progression is to be ascertained from the client in terms of ‘intended progression’ and ‘actual progression’. With regard to recent statistical evidence on outcomes, the current Minister for Education and Science claims that:

Of the number of clients whose progression was tracked in 2008, 85% of them advanced to some form of education or training or to employment and the remaining 15% are still considering their options.

(O’Keeffe, 2009:8)

The data referred to by Minister O’Keeffe has been gathered from the AGMS. The collection of such outcome data is the responsibility of the individual services and can only be achieved through a direct engagement with the client and the manual inputting of such data back into the AGMS. This requires some form of consistent tracking to

measure the short-term and long-term impacts of AEGI service provision for the client. The feasibility, practicality and implications of longitudinal tracking still have to be addressed within the AEGI. This is the focus of this research study. The research will adopt a 'bottom-up' approach by engaging clients of an AEGI service, namely the Regional Educational Guidance Service for Adults (REGSA), to inform the development of a best practice framework for the longitudinal tracking of client progression within the AEGI.

## **2.2 Location of the Research Study**

The site of this research study is REGSA in the Waterford Institute of Technology. The backdrop to this research topic emanates from the findings of an earlier quantitative study I conducted for REGSA between 2004 and 2005.

### *2.2.1 Regional Educational Guidance Service for Adults (REGSA)*

REGSA was originally established in Waterford city in 1998 through EU Integra funding. The project's primary aim was:

to promote lifelong learning opportunities in the South-East of Ireland for adults at risk of social exclusion, through the establishment of an educational guidance service.

(Jordan, 1999:5)

This was achieved through a central guidance service situated in WIT and an outreach service in counties Waterford, Wexford and Tipperary. In reality, as REGSA's reputation grew, the service catered for clients from these counties, as well as County Kilkenny and sometimes further afield. This highlighted the significant lack of provision for adults of all ages who needed specific information, advice and guidance (IAG) to support their education and career transitions.

REGSA came under the auspices of the DES in 1999 as one of its AEGI projects in Phase 1 of the roll-out of the Initiative. The remit of REGSA has changed significantly since 2000 with the introduction of guidance services in Kilkenny, Tipperary, Wexford and,

most recently, in County Waterford. This means that REGSA can now focus solely on provision to its target groups in Waterford city and its environs.

The range of guidance interventions in REGSA includes frontline information and advice through the Information Officer, one-to-one guidance with a Guidance Counsellor and an email and web-based information service. In many of the AEGI services, including REGSA, the Guidance Counsellor is also the Guidance Co-ordinator. Currently, the staffing structure of REGSA is a Guidance Co-ordinator, Guidance Counsellor and Information Officer. According to REGSA's client data management system the service has provided IAG to approximately 5,600 clients between 2000 and April 2009.

As well as its support to clients in the South-East, REGSA has also been to the fore in its contribution to professional practice in the field in Ireland. REGSA has hosted two national adult guidance conferences. The first conference in 1998 was entitled 'The Role of Guidance in Combating Social Exclusion'; the second conference in 2003 was entitled 'Opening the Door to Opportunities'. In addition, REGSA has published three reports. These are: *Looking for Something in the Dark* (Jordan, 1999), *A New Start* (REGSA, 2000) and *Opening a Door: Evaluating the Benefits of Guidance for the Adult Client* (Hearne, 2005). The findings from the third report have provided the impetus for the current study.

### *2.2.2 Background to research topic*

In 2004, REGSA's management decided that an evaluation was required for the future strategic planning of the service. I was assigned to conduct the evaluation between autumn 2004 and spring 2005. On completion of the evaluation I decided to pursue the research further as I was extremely interested in learning more about the clients' individual experiences and how outcomes might be measured more effectively in a client tracking system in the AEGI.

The details of the REGSA evaluation are available in the report *Opening a Door: Evaluating the Benefits of Guidance for the Adult Client* (Hearne, 2005). This evaluation, which was not instigated by the NCGE or DES, was the first of its kind within the AEGI. The aim of the evaluation was to determine client satisfaction with REGSA and ascertain the long-term outcomes for clients who had received IAG intervention. Fundamentally, the evaluation highlighted the “dearth of analysis in the area of tracking the progression of adults in educational guidance provision in Ireland” (Hearne, 2005:23).

In total, 923 clients from the years 2001 and 2003 were sampled through a postal survey for a longitudinal analysis of progression. The response rate was 21.45%. The survey was primarily quantitative but respondents were also given the opportunity to provide some qualitative feedback. Whilst the quantitative analysis provided immediate evidence of the effectiveness of the service and the specific outcomes achieved, the qualitative analysis contributed to a greater understanding of the clients’ experiences of accessing education, training and employment. This feedback brought to light the complexities and multi-faceted nature of individual progression which quantitative data could not convey.

Moreover, the evaluation highlighted a number of difficulties inherent in conducting longitudinal tracking in an adult guidance service. These are:

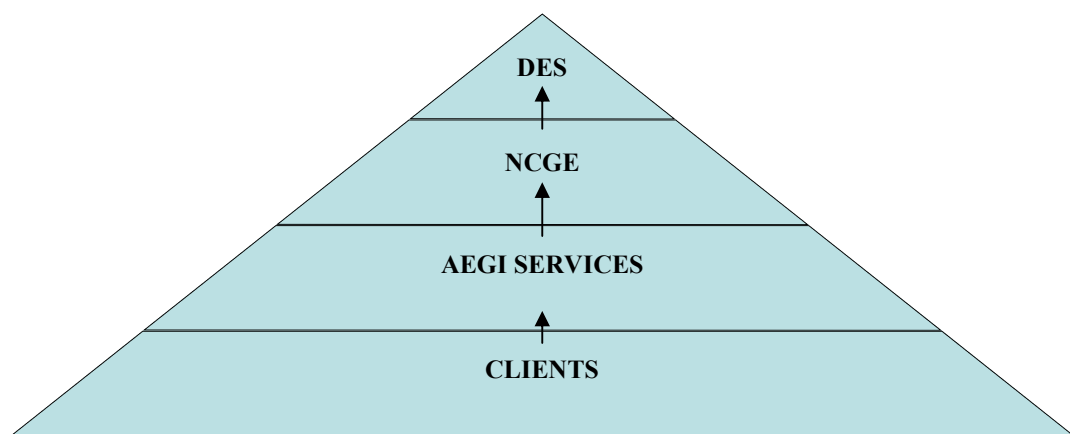
- 1) Clients move location so this can pose enormous problems for tracking.
- 2) Clients quite often forget about having received help from the service.
- 3) Clients can become confused between different organisations.

(Hearne, 2005:21)

As stated earlier, the issue of longitudinal tracking in the AEGI still remains to be addressed by the NCGE. Since 2000, the NCGE and DES have employed a ‘top-down’ administrative approach to gather prescriptive quantitative outcomes from the AEGI services. As a guidance practitioner I have consistently questioned the use of prescriptive outcomes to measure progression which is a highly subjective process for the client. My daily encounters with clients have deepened my understanding of the challenges adults constantly face in their education and career progression. Currently, the softer elements of their personal development are neglected by the DES in the pursuit of quantitative

outcomes to achieve the three public policy goals of learning, labour market and social equity. Although I do not dispute the relevance of these three outcomes for clients I believe the intricacies of clients' lives are disregarded by the relevant stakeholders (NCGE, DES) in the monitoring process.

Therefore, this research study adopts a 'bottom-up', contextual approach grounded at the level of the client of the adult guidance service. *See Figure 2.1.*



*Fig. 2.1: Bottom-up approach of research study*

The grounding of the research in the subjective experiences of the clients will allow some of these life stories to emerge over a longitudinal time frame. The aspiration in using a bottom-up approach is that the findings from this interpretive study will feed upwards to the key decision-makers involved in management and policy formation in Irish adult guidance provision. Feedback is a valuable activity that allows for a greater understanding of the client's needs and barriers which need to be addressed in guidance and education (Oakeshoft, 1990:75). It can also empower users of adult guidance services through giving them greater participation in decisions that affect their lives.

### **2.3 The Context of the Practitioner-Researcher**

This section will briefly address the context of my own role as practitioner-researcher both in REGSA and the wider guidance community in Ireland. McLeod (1999:8) states that “practitioner research is research carried out by practitioners for the purpose of advancing their own practice”. Therefore, practitioner-researchers need to use reflexive self-awareness and be cognisant of the moral and ethical issues associated with these roles.

#### *2.3.1 Issues for practitioner-researchers in adult guidance*

Loxley & Seery (2008:15) argue that research is a form of cultural practice that involves the adoption of certain roles and positions by the researcher and the researched. In the case of practitioner-research such as this study these roles or positions raise issues of power and legitimacy of knowledge. Central to these concerns is the ‘insider-outsider’ distinction in the legislation of ‘truth’ claims (p.15). Insider research in career guidance is undertaken by members of the same group, who supposedly share one or more of a number of characteristics, for example guidance practitioners. On the contrary, outsider research is undertaken by someone who is not a member of that group and is in possession of a different set of characteristics, for example consultants (p.16).

Practitioner-research in adult guidance can lead to valuable insights and further professional practice. From the guidance practitioner’s perspective, becoming involved in guidance research whether through action research or other methodologies can facilitate change within one’s organisation (Robson, 2002:219). The advantages of my position as a practitioner research are my pre-existing knowledge and experience of the situation and people involved, as in the clients and staff of REGSA, as well as my practitioner insights which can help with the design, carrying out and analysis of an appropriate research study (p.535). Furthermore, it is anticipated that the dissemination of the findings of this study will contribute to new knowledge on the topic of impact measurement, provide insights on adult career development and career decision-making, and promote practitioner-research in the wider guidance community.

However, Robson (2002:535) points out that depending on the situation, the disadvantages of practitioner-research can include time constraints, lack of research expertise, lack of confidence and ‘insider’ problems. The insider researcher may have biases towards issues and solutions and possibly be seen as a ‘prophet in his/her own country’. Outsider research may be more valued for its objectivity. The specific issue of validity in this study will be dealt with in more detail in Chapters 5 and 6.

## **2.4 Conclusion**

This chapter has contextualised the research study in terms of adult educational guidance policy and practice, the location of the research study and my own position within the research process. Chapters 3 and 4 will provide a review of the literature relevant to the topic under investigation in this study.

## **Chapter 3: Literature Review: Adult Guidance Policy and Theory**

### **3.0 Introduction**

As grounded theory procedures were adopted at the beginning of the research study, a preliminary literature review was conducted initially (Charmaz, 2006:7). Following the primary data collection a more extensive literature review was carried out which expanded over the course of the research with the emergence of new policy and research in the field. As the literature on guidance is vast, the challenge in the review has been to focus specifically on adult guidance whilst paying attention to the broader theoretical perspectives that have influenced the development of career guidance and counselling since the early twentieth century. However, as the needs of adults can be more diverse and complex than those of younger clients, the literature pays particular attention to the challenges faced by adult clients, practitioners and policy-makers in the context of a changing economic landscape. Career guidance has never operated in isolation, and the theoretical perspectives that have informed it draw upon a number of disciplines including psychology, sociology, education and labour economics (OECD, 2004b:19).

A mapping of the discourses involved a search of the literature from a wide range of sources at a national and international level. The sources include primary texts, academic journals, electronic journals, periodicals and guidance related internet sites. It also includes governmental and non-governmental policy documents, institutional reports and professional publications such as occasional papers, codes of ethics, newsletters, and symposium and conference proceedings. Due to the low level of published literature on guidance in Ireland, there was a reliance on the use of internet sites for contemporary literature. However, bearing in mind that this medium is ephemeral, websites tend to be more frequently updated than printed texts.

The review finds that, although the antecedents of career guidance have been primarily North American, major contributions have and continue to be made by theorists, practitioners and researchers from across the world. In addition to the field of career guidance attention was also given in the review to the significant discourses in adult

education, for example, those of Jarvis (2007), Tight (2003), McGivney (2002), Dewson et al (2000), Knapper & Cropley (2000) and Lynch (1999); and relevant economic discourses, for example, Vandenbrande et al (2006), Nihof (2005) and Mayston (2002).

As mentioned already, literature on the Irish adult guidance sector is limited, reflecting the dearth of research and dissemination in the field. The most recent literature includes guidance reviews, evaluation studies and policy documents (NGF, 2007a; NCGE, 2006; Hearne, 2005; McNamara, 1998), as well as practitioner journals (NCGE, IGC). Evidence from the journals of the NCGE and the IGC indicates that some research is carried out at postgraduate level on Irish guidance practitioner training programmes but this is rarely disseminated amongst the guidance profession.

Following an overall analysis of the literature a conceptual framework was designed which displays, in diagrammatic form, the system of concepts, theories, assumptions and beliefs informing the research topic (Robson, 2002:63). *See Figure 3.1.*

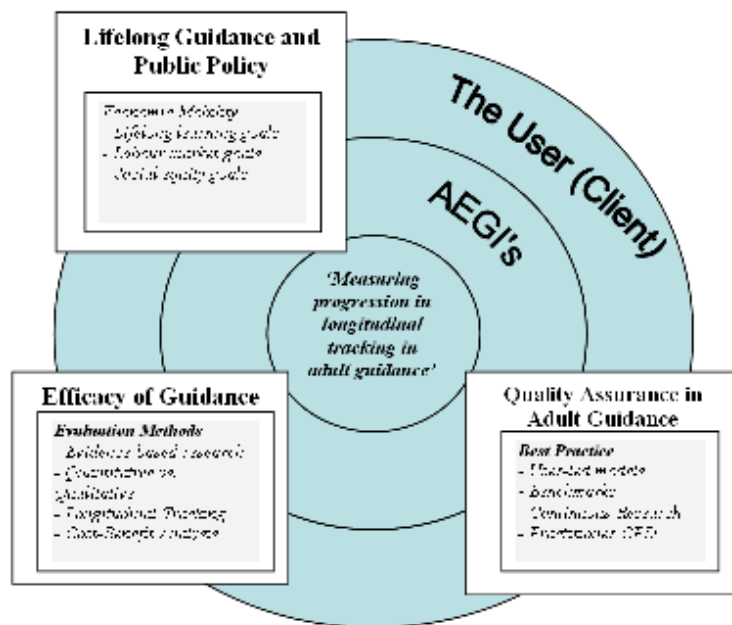


Fig. 3.1: Conceptual framework of literature

As displayed in *Figure 3.1*, the three thematic areas that emerged in the literature review are:

- 1) Lifelong guidance and public policy.
- 2) Efficacy of guidance.
- 3) Quality assurance in adult guidance.

These thematic areas will be discussed in detail in this chapter and Chapter 4. Nonetheless, central to all three areas and underpinning this research topic is the ‘voice of the user’, the client, in the development of a quality longitudinal tracking system.

The literature review is divided into two chapters. This chapter (Chapter 3) concentrates on adult guidance policy and practice. It examines the position of lifelong guidance in the lifelong learning agenda to achieve the three OECD public policy goals of learning, labour market and social equity. It also examines definitions of adult educational guidance, theoretical perspectives (psychological and sociological) underpinning adult guidance, adult career development and career decision-making theories, and concepts related to adults participating in lifelong learning activities.

Chapter 4 investigates the discourse on measuring progression as an outcome in longitudinal tracking systems in adult guidance. In the attempt to measure progression as part of the quality assurance process a number of important issues are examined which relate to definitions, types of outcomes, rationale, and methodologies. The chapter also considers the ‘voice of the user’ in the design of longitudinal tracking systems in adult educational guidance. Finally, an overall analytical summary of both literature chapters is provided at the end of Chapter 4.

### 3.1 Definition: What is Adult Guidance?

The evaluation of guidance outcomes requires a definition of adult guidance and an examination of the interchangeable terminology used to describe the process nationally and internationally. A variety of related terms are used which overlap in practice, for example, guidance counselling, educational guidance, career guidance, and career counselling. Watts & Kidd (2000:489) argue that the emergence of guidance as an educational concept has given rise to debates on what guidance means. They define guidance as a range of processes designed to enable individuals to make informed choices and transitions related to their educational, vocational, employment and personal development. In essence, “career guidance is an umbrella term which can usefully cover progression in learning and work in all these various forms” (p.490).

As the advancement of the AEGI in Ireland was influenced by a longer established sector in the United Kingdom there are parallels in the discourse on the definition of adult educational guidance. In the UK, the importance of adult educational guidance was made clear in the seminal report *The Challenge of Change: Developing Educational Guidance for Adults* (UDACE, 1986). UDACE (1986:18) propose three kinds of guidance relevant to adults. These are:

- 1) *Personal guidance* is concerned with a wide range of personal issues including identity, roles and relationships which can impact on vocational and educational choices.
- 2) *Vocational guidance* involves choices about paid and unpaid work.
- 3) *Educational guidance* involves educational options concerned with learning needs and interests and the possible matching of education activities with employment goals.

UDACE (1986:19) state all three kinds of guidance interconnect in complex ways and depend on the needs of each client. For example, many adults may present for educational guidance with the long-term aim of a vocational outcome. Adults may also present with personal issues in the hope that education will cause personal change.

Alternatively, many vocational and personal outcomes can only be addressed through educational routes. As a consequence of these complexities “educational guidance is a process, rather than a single event, and the same individual will need different kinds of guidance at different times” (p.22).

The educational guidance process involves evaluation of the client’s personal, educational and vocational development; identification of learning needs whilst cognisant of the constraints of personal circumstances, costs, and availability of education options; the pursuit of and progression through education; and review and assessment of learning outcomes and future goals (UDACE, 1986:22). UDACE (1986) contend that guidance encompasses the seven activities of informing, advising, counselling, assessing, enabling, advocating, feeding back (p.24/25). Central to this process is helping clients to make constructive changes in their lives (Egan, 1998:7). As change requires work, guidance can facilitate clients to make decisions, problem-solve, and focus on their goals (pg. 207).

Interlinked with educational guidance is vocational/career guidance. Kidd (2006:99) states that the primary focus of career counselling is to enable clients in their career decision-making to deal with career-related issues. The process involves four stages: “building the relationship; enabling client’s self-understanding; exploring new perspectives; and forming strategies and plans” (p.89). Career guidance is viewed as an ongoing process that requires individuals to assess their career development needs at different points in their lives, understand the process of effective career choice, clarify their options and take action to achieve their goals (Ali & Graham, 1996:1). In light of constantly changing economic situations the focus of career guidance also has to be on helping individuals to develop career resilience through better career management skills (Higginbotham & Hughes, 2006:1; Kidd, 2006:47).

From an Irish perspective, the need for adults to take responsibility for their own lifelong career development, including educational development, is identified in *Guidance in Adult and Continuing Education* (McNamara, 1998:8). McNamara highlights a number

of issues that differentiates adult career guidance from guidance with young people. The issues relate to acquired experience and judgment, the complexity of life roles for adults, blended life patterns which see adults move in and out of work, and the issues of ageing and retirement in later life (p.9). A number of subgroups within the adult working population are identified, for example women entering or re-entering the workforce, mid-life career changers, older workers, unemployed workers and dual-career couples (p.9).

The definition of guidance proposed by the Department of Education and Science (DES) in its policy document *Learning for Life: White Paper on Adult Education* is:

Guidance is a range of activities designed to assist people to make choices about their lives and to make transitions consequent of these choices.

(DES, 2000:156)

The DES (2000: 156/157) states that within the context of adult education such activities include information, assessment, advice, counselling, advocacy, networking, management and innovating systems change. Over the last ten years adult guidance has become positioned within the lifelong guidance paradigm in Irish guidance policy discourse. Lifelong guidance refers to the provision of guidance throughout the lifespan to help citizen's manage transitions between education, training and work as a consequence of the changing nature of labour markets (Sultana, 2008:16). There is also the view that guidance is a lifelong process that produces both personal and social outcomes for the individual.

The Irish National Guidance Forum (NGF) states that:

Guidance facilitates people throughout their lives to manage their own educational, training, occupational, personal, social, and life choices so that they reach their potential and contribute to the development of a better society.

(NGF, 2007a:6)

This shift in Irish discourse has been influenced by recent developments in European guidance policy which is discussed in more detail in 3.2. However, the definition of guidance put forward by the Council of the European Union goes further than the NGF in

its focus on the development of competencies related to learning, work and other settings, as well as the process involved in the intervention. The Council defines guidance as:

A continuous process that enables citizens at any age and at any point in their lives to identify their capacities, competences and interests, to make educational, training and occupational decisions and to manage their individual life paths in learning, work and other settings in which those capacities and competences are learned and or/used. Guidance covers a range of individual and collective activities relating to information-giving, counseling, competence assessment, support, and the teaching of decision-making and career management skills.

(Council of the European Union, 2008:2)

Similar definitions of lifelong guidance can be found in a number of recent international guidance policy documents, including:

- *Career Guidance and Public Policy: Bridging the Gap* (OECD, 2004b:19);
- *Career Guidance: A Handbook for Policy Makers* (OECD, 2004a:10);
- *Improving Lifelong Guidance Policies and Systems* (Wannan & McCarthy, 2005:11); and
- *Guidance Policies in the Knowledge Society* (Sultana, 2004:24).

### **3.2 Adult Educational Guidance Policy**

This section concentrates on an examination of Irish adult educational guidance policy and the socio-political ideologies embedded in guidance discourse in general. It positions Irish guidance policy within the broader context of European and international guidance policy of recent years. The findings from a more in-depth secondary data analysis of Irish policy discourse are presented in Chapter 8.

In terms of guidance policy, Watts (1996a:351) argues that:

Career guidance and education is a profoundly political process. It operates at the interface between the individual and society, between self and opportunity, between aspiration and realism. It facilitates the allocation of life chances. Within a society in which such life chances are unequally distributed, it faces the issue of whether it serves to reinforce such inequalities or to reduce them.

(Watts, 1996a:351)

Therefore, Watts (1996a:352) contends that the socio-political nature of guidance is problematic as it can be viewed as a form of social reform and social control. Guidance

practice is informed by a number of socio-political perspectives that are brought into sharp focus by the issue of unemployment (Watts, 1996a:352). The four approaches are displayed in *Table 3.1*.

*Table 3.1: Four socio-political approaches to career education and guidance*

	<b><i>Core focus on society</i></b>	<b><i>Core focus on individual</i></b>
<b><i>Change</i></b>	Radical (social change)	Progressive (individual change)
<b><i>Status quo</i></b>	Conservative (social control)	Liberal (non-directive)

(Source: Watts, 1996a:355, adapted from Watts & Herr, 1976)

Watts (1996a:352/354) states that the *liberal* or *non-directive* approach is concerned with helping individuals make choices appropriate to their abilities, skills, interests and values. Watts contends that this approach is critiqued by sociologists who view guidance as a *conservative* means of social control concerned with meeting labour market needs. In contrast the *progressive* approach is concerned with supporting individual change. This proactive approach focuses on raising the aspirations of individuals from underprivileged backgrounds. However, it is also proposed that guidance needs to be more *radical* and promote social change for individuals through change in social structures, for instance, advocacy and feedback. Watts claims that the liberal-progressive approaches tend to be dominant in career guidance and are uncontested when employment is high. Increasing unemployment makes them open to attack as opportunities become scarce and choices are limited. Both the liberal and progressive approaches are then viewed as hidden forms of social control, especially in relation to the hidden-economy which individuals tend to depend on in times of economic instability (p.356).

Career guidance is both an *object* and *instrument* of public policy (Watts, 1996b:380). Watts states that as most career guidance services are government funded, they are the object of public policy. In addition, through funding provision career guidance is an instrument of public policy as “it is commonly argued that guidance is a public as well as a private good, in economic and /or social terms” (p.380). The increasing contribution of

career counselling to labour market processes has reinforced the role of career counselling and related interventions as sociopolitical instruments in the achievement of national goals (Herr, 2003a:8). This role was made apparent in the international reviews of career guidance policies in 37 countries carried out by the OECD, the European Commission and the World Bank between 2001 and 2002 (Sultana, 2004:5).

The OECD policy directive *Career Guidance and Public Policy: Bridging the Gap* (2004b) stipulates the three public policy goals that career guidance is expected to address are:

- 1) Lifelong learning goals that contribute to the development of human resources, the efficiency of education systems and improve the fit between education and the labour market;
- 2) Labour market goals that include the match between supply and demand, help improve labour mobility and support the ability of the labour market to adjust to change;
- 3) Social equity goals that include the support of equal opportunities and the promotion of social inclusion.

(OECD, 2004b:18)

As guidance is now central to the achievement of these three policy goals it has become firmly positioned in a number of European education, training and employment policies. Guidance provision is being promoted within lifelong learning strategies for the development of a competitive and dynamic knowledge-based society which is central to the Lisbon Strategy. The development of indicators and benchmarks in guidance are seen as “key elements of evidence-based policy making and the monitoring of progress in the pursuit of Lisbon objectives” (Commission of the European Communities, 2007:3).

Specifically, the consolidation of lifelong guidance into European lifelong learning policy has emerged through the Council of the European Union’s *Draft Resolution* (2004) and its more recent *Council Resolution on better integrating lifelong guidance into lifelong learning strategies* (2008). Particular focus is given in the Council Resolution to the issues of safeguarding individuals’ career paths in a globalised world, supporting citizens’ mobility in an enlarged Europe, and the empowerment of citizens’ to manage their own career transitions in the context of today’s fluctuating labour markets (p.1).

The Council Resolution identifies four priority areas for career guidance:

- 1) To encourage the lifelong acquisition of career management skills;
- 2) To facilitate access by all citizens to guidance services;
- 3) To develop quality assurance in guidance provision;
- 4) To encourage coordination and cooperation among the various national, regional and local stakeholders.

(Council of the European Union, 2008:5)

The international dissemination of these policy objectives has evolved over the last ten years through a number of discursive practices. At an organisational level, for example, through the creation of a European Expert Group for Lifelong Guidance in 2002; the establishment of the International Centre for Career Development and Public Policy (ICCDPP) in 2004; and the formation of the European Lifelong Guidance Policy Network (ELGPN) in 2007. The CEDEFOP publication *Improving Lifelong Guidance Policies and Systems* (Wannan & McCarthy, 2005) was a measure to improve policy through the development of a number of European reference tools. The tools include common reference points for quality assurance systems which position the ‘citizen’ as central to the development of a culture of continuous improvement in guidance services (p.13).

Public policy objectives have also been disseminated through the four International Symposium Series on Career Development and Public Policy between 1999 and 2007, and three EU Presidency Conferences on Lifelong Guidance (2004, 2006, 2008) which included Ireland as the host country in 2004. Ireland has participated in the four International Symposiums with representation at various times from the National Centre for Guidance in Education (NCGE), Institute of Guidance Counsellors (IGC), FÁS, Department of Education and Science (DES) and Department of Enterprise, Trade and Employment (DETE). In the most recent International Symposium (2007) the Irish report identified three priority areas in Ireland’s National Development Plan (NDP, 2007-2013) that have a particular impact on career development services. They are the Human Capital Priority, the Social Inclusion Priority and the Enterprise, Science and Innovation Priority (Bohan et al, 2007:7). The goal of Irish policy-making is the creation of a

sustainable knowledge-based economy through continuous investment in Ireland's human capital (p.5).

The Irish Government's commitment to the establishment of a national policy for lifelong learning has become a governing principle underpinning the adult education sector (DES, 2000:54). By and large adult guidance policy has been strongly positioned in our education policy discourse since 1998. The emergence of adult guidance into the policy discourse occurred with the report *Guidance in Adult and Continuing Education* (McNamara, 1998) which had an input into the Green and White Papers. In 2000, *Learning for Life: White Paper on Adult Education* (DES, 2000) recommended the establishment of a national adult education guidance and counselling support service to adults re-entering education. The result was the strategic development of the Adult Educational Guidance Initiative (AEGI) between 1999 and 2007.

In 2002, an OECD country review found that while career guidance provision in Ireland was strong there were also a number of gaps that needed to be addressed. In order to achieve the seamless integration of career information, advice and guidance into national lifelong learning frameworks particular attention has to be given to those individuals who are in a process of transition between employment and learning. The OECD review recommended that attention needs to be given to adults who do not fit into the specific remit of major third-level institutions, further education, FÁS, the Local Employment Service (LES) and the AEGI. One example of this is women outside of the labour force (p.16). The review also identified specific weaknesses in linking policy making and practice through the absence of established systems to track client progression and monitor long-term guidance service use (p.19).

The establishment of the Irish National Guidance Forum in 2004 and its subsequent policy report *Guidance for Life: An Integrated Framework for Lifelong Guidance in Ireland* (2007a) can be viewed as a measure to address some of the gaps identified by the OECD of 2002.

The Forum has:

focused not only on the economic imperative for improved guidance services, but also on the important role that guidance plays in promoting effective personal development and social inclusion, which the Forum regards as vital pre-requisites of sustainable economic development.

(NGF 2007a:30)

The four key objectives of the Forum (2007a:5) were:

- 1) To ensure guidance becomes central in public policy-making in education, labour market and social strategies.
- 2) To implement models of guidance.
- 3) To agree mechanisms for measuring relevant and realistic outcomes.
- 4) To move from a fragmented to a multi-faceted provision within an integrated lifelong guidance framework.

With regard to mechanisms for measuring outcomes, it still remains to be seen how agreement is to be reached across the different guidance sectors and the implications for the adult educational guidance services in the future.

A critical discourse on the impact of public policy for guidance practice has emerged in the field. It has been stipulated by the Council of the European Union (2004:2) that the positioning of lifelong guidance within a lifelong framework is for economic development, labour market efficiency and occupational and geographic mobility. Brown (2004:1) questions the relevance of the distinctions between lifelong learning (for the self, critical engagement with the world, personal fulfillment) and lifelong education (skills acquisition linked to employment or future employability) and the effect on guidance practice. The concern is that there will be more emphasis in future guidance practice on the second perspective (employers) at the expense of the first (learning).

Clayton (2004:1) contends that it is not the task of guidance to steer every individual towards lifelong learning as “access to learning is not always the first priority, and formal education does not always produce an improvement in individual economic situations”.

She argues that the task of guidance is to address dispositional (personal) barriers that prevent many people from accessing learning opportunities even though institutional and situational barriers still need dismantling.

The role of guidance in enhancing individual mobility and autonomy in the context of global economic competition and changing employment opportunities is a challenging one. Watts & Kidd (2000:498) point out that for those individuals who are socially and educationally disadvantaged, even with skilled guidance, “their ability to achieve the level of autonomy” in their career management may be limited. As a result of the shift to mass higher education and credential inflation, Watts & Kidd argue that employers have adjusted their selection criteria to choose those who have the social and cultural capital to progress.

The issue of cultural capital and guidance is explicated by Bourdieu’s claim that, in order to access cultural capital, people need to have a familiarity with the dominant culture (language and cultural competence) which can only be produced by family upbringing. Bourdieu’s argument is that certain social classes can be excluded from learning, and in this case guidance, because of their lack of knowledge and understanding of education, information and advice systems (Bourdieu & Passeron, 1990:32).

Similarly, the concept of cultural capital is addressed from a social justice perspective and the marketisation of guidance (Plant, P, 2005:ii). Plant, P argues that the rhetoric of globalisation emphasises freedom, flexibility of choice and the idea of learning as open and available to all parts of society. However, in reality, a “neo-liberal economic rationalist rhetoric in which everything is subservient to the needs of the market” has led to an increasing polarisation in society as it is only those who have the cultural capital to be flexible in their learning and employment will progress. Guidance is now viewed as a ‘lubricant’ to facilitate transitions from learning to working life based on the concepts of self-determination and choice.

There is now an increasing responsibility on individuals to manage their own futures, regardless of race, gender, social class or (dis)ability (Irving & Malik, 2005:2). This puts pressure on individuals to achieve more, regardless of their background or circumstances. It is now argued that career education and guidance places too much emphasis on the instrumentalist values associated with the demands of employers and economic outcomes at the expense of social justice goals (Irving, 2005: 10). Career is constructed in terms of the development of career management skills, continuous learning or labour market participation. Irving argues:

What is missing in current discourse is the relationship between career learning and the development of active citizens who are able to locate their understanding of self, work and opportunity within a socially just and relevant critical educative framework.

(Irving, 2005: 18)

In terms of guidance outcomes, career guidance is essentially a ‘soft’ rather than a ‘hard’ policy intervention (Watts, 2004:120). The needs and interests of the individual are a core principle of the guidance profession maintained by ethical considerations, such as trust and confidentiality, which can only serve public good. Watts states:

For policy makers, this raises the issue of whether they expect practitioners to pursue the outcomes defined by policy objectives in their dealings with an individual client; or whether they are willing to support practitioners in addressing the individuals’ interests.

(Watts, 2004:121)

Greater collaboration between policy-makers and practitioners is advocated as the ongoing focus of policy in assessing the outcomes of career guidance has been in terms of the benefits and costs of the activity (Maguire & Killeen, 2003:17). If the rationale is one of *cost-benefit*, as opposed to *cost effectiveness*, there is a concern that guidance will be dependent on attaining suitable economic outcomes to ensure funding. Cost-benefit techniques can be applied “where it is possible to measure the money value of outputs as well as inputs’ (Watts & Dent, 2006:178). In contrast, cost-effectiveness in career guidance services is defined as “the ratio of client gain to dollars invested in the service”, (Sampson et al, 2004:278).

The link between *cost benefit* and economic outcomes is addressed by Irving & Malik (2005:4) who contend:

The need to demonstrate the economic benefits accruing from career education and guidance in order to secure government funding and support (Bysshe *et al.* 2002) further entrenches the view that its primary goals should be narrowly related to labour market productivity and participation.

(Irving & Malik, 2005:4)

However, Hughes et al (2002:4) argue that assessing the economic benefits in policy is becoming increasingly important for a number of reasons including the justification of current and future levels of funding, the identification of quantifiable beneficial service achievements for performance management, and to look at best value and the setting of quality targets for providers. However, Bimrose et al (2004:10) assert:

These different ‘discourses’ trigger contrasting motivations towards assessing the outcomes of effective guidance, with varied outcomes identified, such as:

- value for money;
- meeting organisational goals;
- achieving government agendas;
- providing a meaningful service of value and use to recipients;
- benefiting an individual client on a personal level.

(Bimrose et al, 2004:10)

In the UK, policy changes have led to a greater emphasis on quantitative outcomes at the expense of anecdotal accounts of the benefits from IAG, competition for resources, an increasing expectation for impact evidences and higher levels of scrutiny and accountability (Bimrose, 2006:2). In terms of policy accountability, Rist (1998:413) argues that “policy makers have no equally grounded means of learning about program impacts and outcomes as they do with qualitative research findings”. He claims that although the intention of using sophisticated quantification is for reliability and replication, it is “qualitative work that can address the issue of validity” (p.414).

Finally, there is insufficient engagement of guidance service users, the clients, in the development of public policy. At present, the ‘top-down’ approach adopted by policy-makers, neglects to capture and reflect the views of users in the adult guidance sector.

Plant, H (2005:2) states:

The rights and needs of individual citizens are at the heart of the European discourse on citizenship, and there is growing awareness in member states that effective democracy means devolving to individuals and communities the right to play an active role in shaping services that affect lives.

(Plant, H, 2005:2)

Plant, H (2005:2) stresses that in spite of the articulation in British policy that users should engage in planning and decision-making processes, no commitment has yet been made to involve users of adult guidance services in policy development. Likewise, in Ireland, whilst the inclusion of users at a structural level in provision, delivery and policy has been verbalised it has not been implemented (NGF, 2007a:24). This issue is addressed in more detail in Chapter 4 (4.1.3).

### **3.3 Theoretical Perspectives in Adult Guidance**

Theory can mean very different things to different people (Robson, 2002: 61). In career guidance a theory is “a series of connected hypothetical statements designed to explain a particular behaviour or set of behaviours” (Swanson & Fouad, 1999:3). Herr et al (2004:623) argue that hypothesis testing has attempted to evaluate a number of major assumptions about career behaviour: career development is continuous and longitudinal; it is composed of a number of different developmental tasks over the lifespan; career development and personal development are interrelated; and certain interventions can influence or modify career development over time. From a political perspective, economic theories represent policy rationales for guidance (Killeen, 1996b:40). Killeen argues that economic theories “also suggest forms of practice, emphasising information and prescriptive or normative strategies for taking specific forms of rational decisions” (p.40).

#### *3.3.1 Psychological and sociological perspectives in guidance*

The theoretical perspectives that have informed career guidance draw upon a number of disciplines, for example psychology, education, sociology and labour economics. Both

the psychological and sociological perspectives will be addressed here and discussed further in the methodology chapter (Chapter 5).

Historically, psychology, principally differential and developmental, has had a major influence on guidance, using one-to-one interviews and psychometric testing as its central tools (OECD, 2004a:19). Watts & Kidd (2000:490) state that the theoretical approaches underpinning guidance can be divided into two historical periods. A clear distinction can be made between the *directive* and *reactive* approaches of the first half of the twentieth century, and the *non-directive approaches* and *proactive* approaches of the later part of the century.

In the first half of the century *directive* and *reactive* approaches were used in career guidance in the form of assessment and advice-giving (Watts & Kidd, 2000:490). The differentialist approach which has been at the forefront of vocational psychology focuses “on individual differences, characteristics that distinguish individuals from others” (Kidd, 2006:14/15). Kidd states that this approach forms the basis of Parsons’ (1909) and Holland’s (1966) ‘person-environment fit’ theory in vocational psychology. Parsons originally formulated the conceptual model on which the field rests (Savickas & Baker, 2005:25). Parsons’ three-step paradigm incorporated increasing self-knowledge, providing occupational information, and matching self to job. Also known as the ‘trait and factor’ model, this theory was later developed by Holland as a practical tool for objectively correlating an individual’s interests, abilities and values with similar traits needed for specific jobs.

However, these theories were challenged by the person-centred and developmental approaches during the twentieth century. *Non-directive* and *proactive* approaches changed the guidance counselling dynamic to a facilitative role of decision-making with the client (Watts & Kidd, 2000:491). These approaches, which are based on the needs and interests of learners, were applicable to adult educational guidance intervention. Rogers (1965) client-centred or nondirective approach in counselling and psychotherapy

has influenced guidance counselling. In this approach the “most important influence on the progress made in the counselling session is the relationship between the counsellor and the client” (Kidd, 2006:52). From another perspective, Kidd states that developmental approaches such as Super’s (1957) view career choice as a continuous process that involves a number of aspects (p.19). The key concepts are developmental stages, tasks, career identity and career maturity. Kidd states that the notion of career maturity “can be defined as the readiness to deal with the developmental tasks appropriate to one’s career stage” (p.20).

Criticism of the long-standing psychological position in guidance that applies the viewpoint of positivist science has been prevalent for some time. Specifically, the differential approach which provides practitioners with a rational and objective model may not fully account for issues such as age, gender, ethnicity or culture. In addition, the trait and factor model relies “on stable occupations and predictable career paths” (Savickas, 2000:56). Savickas (2006:8) argues that new paradigms are now required as individuals negotiate a lifetime of job transitions and learn to self- manage their careers in the face of constant organisational change.

Alternative paradigms are being proposed that will enable clients to negotiate the changing nature of education, employment, and social structures on an ongoing basis in the future. For example, constructivist approaches have been foregrounded in career guidance. These include personal construct psychology, biographical hermeneutics and the narrative paradigm (Savickas, 1997:150). Constructivist metatheory provides the inspiration and support for the client to find “personal meaning and become an agent in one’s own life” (Savickas, 1997:151; Watts, 1999:5). Constructivism has an influence on some of the key elements of career counselling which include the counselling relationship, the nature of the counselling process, the use of language and the role of assessment (McMahon & Patton, 2006:7).

In constructivism, the narrative paradigm in particular promotes the idea that narration produces meaning and is socially constructed through dialogues with significant others. Career narratives guide individuals to enact the work role through telling who they are, how they got that way and where they are going (Savickas, 1997:171; Gibson, 2004:1). Reid (2006:32) argues that even though narrative approaches may be viewed as leaving the client ‘stuck in the past’ an exploration of the past is helpful to provide meaning and identify interests and life themes for the future. Furthermore, Reid proposes, as does Chen (2003:1), that older theories such as the positivistic view can be integrated with constructivist approaches to operate in connection with other frameworks in guidance practice (p.35).

Brown et al (1990:4) assert that while psychological based theories have dominated the field, sociological theories of occupational choice focusing on status attainment, gender, race and culture are also important. However, because of the lack of reconciliation between the two disciplines, theories have either tended to be either psychological or sociological leaving practitioners without specific guidelines for practice. Kidd (2006:70) identifies strengths and weaknesses of four psychological approaches used in career counselling. These are displayed in *Table 3.2*.

*Table 3.2: Strengths and weaknesses of four approaches to career counselling*

<b>Approach</b>	<b>Strengths</b>	<b>Weaknesses</b>
<i>Person-centred</i>	Influenced a wide range of therapeutic practices.	The core conditions are unlikely to be sufficient in career counselling, where information is frequently needed.
<i>Psychodynamic</i>	Provides a sophisticated conceptual framework from which to view the client’s development.	Many propositions are difficult to test empirically.
<i>Cognitive-behavioural</i>	Suggests practical techniques which lend themselves to evaluations of effectiveness.	Pays little attention to the relationship between the career counsellor and the client.
<i>Narrative</i>	The use of storytelling of everyday life experiences suitable in career counselling process.	Different interpretations of narrative approaches could lead to confusion.

*(Adapted from Kidd, 2006: 70)*

From a sociological perspective, the subject of career is usually examined in terms of social mobility which refers to the “movement of individuals or family units within a system of occupational categories or social class system” (Maranda & Comeau, 2000:37). Maranda & Comeau assert that it is important that career counselling professionals recognise that the profound changes affecting social mobility and career development are constrained by economic contexts and strategic individual and collective behaviour (p.50).

The issue of practitioners working beyond the level of the individual to advance social change requires further attention in the field (Kidd, 2006:120). Irving (2005:16) argues that the continuing influence of humanistic psychology in career education, that is, the construction of self-identity, does not occur in a vacuum and consideration should also be given to social and cultural influences that shape people. Essentially, the definition of career in relation to progression in learning and work neglects broader issues such as active citizenship, equality in labour market practices or the pursuit of socially just goals. Moreover, the promotion of self-determination in psychological approaches encourages a hegemonic economic rationality which is found in the capitalist systems of the west (Douglas, 2005:28).

### *3.3.2 Theories of adult career development*

A distinction can be made between career theories and career guidance theories. The former is concerned with individuals’ career experience, decision-making and environment, whereas the latter focuses on the best interventions to assist the individuals in their career development (Kidd, 2006:7). As the focus of this study is on outcomes, rather than process, this section and section 3.3.3 reviews the prominent career theories of adult career development and career decision-making which can expand the understanding of issues related to adult career transitions. However, all career theories should be evaluated within their historical and geographical contexts.

Adult career development needs to be examined in the context of theories of adult development (McNamara, 1998:8). Recent theories consider adulthood within the cultural context; psychological developmental stages; a series of transitions; and continuity and change over the lifespan. Developmental theories can be viewed in terms of personal development (stage theories), and specific adult career development theories (Kidd, 2006:32). Stage theories view the life course as a series of stages where certain life tasks are achieved at certain points across the lifespan.

One of the major stage theories is Levinson et al's (1978:18) proposition of nine different tasks across a number of transitional points in early adulthood (17-45), middle adulthood (40-60) and late adulthood (60+). Early adulthood involves following a career dream, forming relationships and settling down. Middle adulthood involves reviewing, revising and modifying one's life choices. Late adulthood is concerned with coming to terms with old age. A number of limitations of Levinson et al's theory have been put forward over the years. These limitations include its small sample of forty men only, its short time frame (4 years) for a longitudinal study, and that the rigidity of the age stages did not account for individuality of people's experiences (Kidd, 2006:36/37). The gender limitation was addressed through a follow-up study by Levinson in the 1980's on women's development. In this subsequent research, it was found that women do "progress through the same age-related stages as men, but their development is more affected by cultural and social stereotypes and sexism" (p.37). However, as a woman's career development may be closely related to the family life cycle and changes in the family unit it may not evolve in defined sequential stages (p.43).

Kidd (2006:36) asserts that Levinson's theory has also been critiqued for its over-emphasis on the mid-life crisis stage in middle adulthood. She claims that more recent evidence suggests that the 'age 30' transition is more disruptive psychologically, and a significant career change is most likely to occur around the age of thirty than later on in life. Furthermore, for some adults change in middle age is often experienced as a

challenge rather than a crisis, allowing for “an expansion of involvement in community-based and socially responsible activities” (Sugarman, 2001:25).

With regard to specific adult career development theories, Super’s life-career rainbow claims that vocational development occurs during five different life stages in the lifespan and involves nine roles. The stages are growth, exploration, establishment, maintenance and decline (Super, 1957:71). “The processes of exploration, establishment, maintenance and decline are not simply vocational, but involve all aspects of life and living” (p.72). The roles are child, student, leisurite, citizen, worker/pensioner, spouse, homemaker and parent (Super, 1980:282). Super argues that the “decision points of a life career reflect encounters with a variety of personal and situational determinants” (p.294.) The personal determinants include self-awareness, attitude, interests, needs/values, achievements, aptitudes and biographical heritage. The social determinants involve social structures, economic conditions, employment practices, school, community, and family (p.295).

Whilst Sugarman (2001:15) argues that “everyone’s life-career rainbow contains some universal, some unique, and some shared but not universal features”, Super’s theory is also criticised. It is viewed as being too value-laden, failing to allow for differences between individuals in work salience. Work salience is the perceived importance of work in an individual’s life (Kidd, 2006:21). Furthermore, its lack of generalisability to women’s career development and neglect of the psychological processes involved in work transitions are weaknesses of the theory (p.43).

Stage theories can be critiqued for their prescriptivism as there is an assumption that individual development and career development follow similar patterns across the lifespan. They do not account for factors that can directly influence career choice, for example, self-concept, ability, gender, divorce, illness, redundancy, migration and culture. A further limitation of stage and developmental theories is their disregard for cultural differences as they reflect western values of individualism, autonomy and the centrality of work in people’s lives (Kidd, 2006:49). Kidd argues that as a result of

increasing multiculturalism in our societies, practitioners need to integrate multicultural perspectives into their understanding of career development and their guidance work (p.50).

Adult career development can also be considered in terms of life events and milestones or transition points over an individual's lifetime (Sugarman, 2001:135). Central to this theory is the idea that any type of positive or negative life event, such as, promotion or unemployment, can disrupt an individual's accustomed way of life and trigger a transition that may require certain coping strategies to progress (p.144). In adult career development coping strategies may be explained in terms of *locus of control* whereby the beliefs that people have about how much they can control situations can influence the amount of stress experienced (Rotter, 1966, in Hayes, 2000:407). For example, people with an *internal locus of control* believe that they control their own lives and as a result experience less stress. In contrast, people who have an *external locus of control* believe they are victims of circumstance and are more passive in their approach to life.

Two alternative approaches to understanding adult career development focus on agency (Hall, 2002) and context (Young et al, 2002). Hall (2002:11) proposes that career is composed of both behaviours and attitudes and can be conceptualised as *subjective* and *objective*. A subjective career consists of the "changes in values, attitudes, and motivation that occur as the person grows older"; whereas the objective career is composed of the "observable choices one makes and the activities one engages in, such as the acceptance or rejection of a particular job offer" (p.11). The idea of subjective career fits in with the concept of a 'boundaryless' career as people now have to cope with fragmented working lives and continuous transitions across the lifespan (Arthur et al, 1999:78). However, an understanding of both the subjective and objective career is critical to career counselling as clients seek career guidance with the expectation of achieving success and satisfaction in their work (Kidd, 2006:45).

The contextualist approach in career development views career as goal-directed, intentional and contextualised (Young et al, 2002:213). Through interpretation and narrative people make sense of their actions and context (p.219). More importantly, contextualism attends to issues of emotion, culture and gender in career development (p.224). Constructivism is derivative of the contextualist worldview in that real world events are a cognitive construction and perspectives are formed from person-environment interactions (Patton & McMahon, 2006:4).

On a practical level, McMahon & Patton's (2006:95) Systems Theory Framework (STF) adopts a constructivist approach that integrates both career theories derived from the logical positivist worldview of logical, rational processes and the constructivist worldview that emphasises holism, personal meaning, subjectivity and recursiveness between influences. The STF presents interconnecting systems of influence on an individual's career development. The systems are the individual system, the social system, and the environmental/societal system, while the process influences include recursiveness, change over time and chance.

### *3.3.3 Theories of career decision-making*

Historically vocational behaviour theories of career decision-making have been prominent in providing frameworks for adult guidance practice. Three of the dominant vocational behaviour theories are person-environment fit theories, developmental theories and social learning theories.

In the United States, the person-environment fit theory advocated psychometric testing for occupational fit which suited the requirements of an emerging industrial nation in the early part of the 20<sup>th</sup> century. This hypothesis is found in Holland's theory which claims that vocational choice is an expression of an individual's personality. The achievement of congruence between one's interests and a similar work environment results in a better fit (Holland, 1997:7). The six personality types and work environments are Realistic, Investigative, Artistic, Social, Enterprising and Conventional (1997:1/2).

Holland's model can be critiqued for a number of reasons. Kidd (2006:17) contends that it oversimplifies the idea of 'fit' as it does not account for the complexities of the work environment, such as ability and the demands of work and the reciprocal influences between individuals and work environments. Brown (2002:9) argues that the model focuses on explanations of why choice occurs and the outcomes of choice whilst neglecting why people develop certain personality types.

From a developmental perspective, Gottfredson (2002: 86) proposes that career decision-making involves circumspection and compromise. Circumspection is the process by which individuals reject alternatives they deem unacceptable, whereas compromise involves abandoning their most-preferred alternatives by adjusting aspirations to accommodate their external reality (p.100). Gottfredson argues that vocational expectations are determined early in life depending on gender, race, social class, and that vocational choice may depend on accessibility, compatibility and compromise. As this theory claims that the elimination of options at an early stage in life limits an individual's chances later on, it would appear to neglect the issue of adults returning to education in the hope of redressing earlier choices and changing their personal and social circumstances.

Whilst the person-environment fit and developmental theories presume an interaction of the person with the environment; Krumboltz's (Mitchell & Krumboltz, 1996) more recent social learning theory suggests that people acquire beliefs about themselves and work through instrumental and associative learning. From a social learning perspective, Mitchell & Krumboltz (1996:105) state that the four factors that influence the individual's career path are innate genetic abilities and talents that are developed over time; the influence of environmental conditions and events; the individual's own learning experiences, and the skills that are brought to the task such as expectations of performance, work habits, cognitive processes and emotional responses.

More recently Krumboltz and his colleagues have been developing ideas around career indecision proposing that clients can create and benefit from unplanned events. Mitchell et al (1999:1) state that the concept of 'planned happenstance' means that chance plays an important role in everyone's career. In the context of a changing world, 'planned happenstance' encourages individuals to develop skills to recognise, create and use chance in their career development in order to respond to career uncertainties. It requires individuals to be proactive, curious, flexible, optimistic, persistent and willing to take risks in spite of uncertain outcomes (p.4).

In response to the dominance of psychology in career decision-making theories, the sociological aspect also requires consideration. Kidd (2006:23) asserts that structural theories help to define the structural constraints within which career decision-making occurs as they explain careers in terms of social environments, labour market segregation, family background, social position and cultural capital.

In terms of social influence in career decision-making the Social Cognitive Career Theory (SCCT) focuses on individuals as active agents and highlights diversity, contextual factors and learning influences on career choice behaviour (Lent et al, 2002:255). SCCT suggests that "self-efficacy beliefs and outcome expectations both predict academic and occupational interests" (Kidd, 2006:26). In relation to self-efficacy, Bandura (1997:79) argues that people can exercise influence over what they do. He proposes that the four sources of self-efficacy are mastery or performance accomplishments that can indicate capability, vicarious experiences or modelling, encouragement and support from others, and low levels of anxiety and stress. In career counselling, it is claimed that low self-efficacy expectations regarding a behaviour lead to avoidance, poorer performance and a tendency to 'give up' when faced with an obstacle or failure (Betz, 2004:2). "An outcome expectation is a judgement of the likely consequences certain performances will produce" (Bandura, 1997:21). Betz (2004:19) argues that in career research outcome expectations may be especially important for

underrepresented groups in society for whom obstacles to their goals may be substantial (Betz, 2004:19).

The differential and developmental models of career decision-making also call for appraisal within the context of the current economic and technological changes and the impact of globalisation on individuals and society. Risk, uncertainty and instability are prominent characteristics of contemporary society that impact on adults' career choices (Paton, 2007:47; Beck, 2001:398). In the future the notion of career will change dramatically as linear and stable dimensions "give way to non-linear, unstable and chaotic components" (Riverin-Simard, 2000:115). As people can no longer depend on educational institutions or work organisations for career direction the focus has shifted to employability and self-organising behaviour (Amundson, 2006:5). In a knowledge-driven society individuals must now learn to form an identity, determine a direction and continuously career plan (Wijers & Meijers, 1998:199).

To address such issues an interactive and dynamic model of career development that incorporates *career decision-making*, *career management* and *career resilience* is put forward (Watts & Kidd, 2000:496). This three-fold model attends to a number of elements for individuals including relationships with economic and social institutions, construction of unfolding careers over time, decision-making on progression in work and learning, and emotional resilience in the context of uncertain labour markets and diverse career options (Kidd, 2006:48).

Amir et al (2008:283) state that career decisions are amongst "the most important decisions people make at different points and stages in their life". Current longitudinal research finds that a f typology of career decision-making has emerged (Bimrose et al, 2008:33). The four career decision-making styles are:

- 1) Evaluative careerists who use self-appraisal and evaluation;
- 2) Strategic careerists who assess situations and goal plan;

- 3) Aspirational careerists who form distant careers goals interlinked with personal circumstances and priorities; and
- 4) Opportunistic careerists who exploit available opportunities rather than make conscious career choices.

Bimrose et al (2008:79) claim that opportunistic career decision-makers are least likely to have future career plans, whilst strategic career decision-makers are more likely to plan for the future. In terms of practice, the four career decision-making styles “demonstrate the irrelevance of imposing an approach to guidance that assumes all clients are going to be ‘rational’, ‘strategic’ or ‘planful’ in their decision making” (p.58). Bimrose et al. argue that whilst some practitioners do employ new approaches in their work, the adoption of such approaches risks not being able to meet targets related to quantifiable outcomes.

In view of unpredictable labour markets individuals will need emotional resilience to cope with frequent job changes and periods of unemployment and uncertainty (Kidd, 2006:47). Kidd claims that career theory has disregarded this affective element of career management. “It seems likely that career events produce a broad range of emotions, which can effect the way people approach their work and their careers” (pg.49). Bimrose et al (2008:7) define career resilience as the ability to proactively take control of one’s career progression through the management of challenging and difficult circumstances.

The issue of adaptability and resilience is relevant for clients seeking vocational rehabilitation as injuries can “adversely affect otherwise established patterns of workplace behaviour” (Elliott & Leung, 2005:331). Similarly, resilience is required of the many older adults who may want to continue working and/or change direction for reasons of under-utilised potential, changes in personal values and the achievement of personal ambitions (Ford, 2005:4). However, evidence suggests a polarisation of the labour market for adults after the mid-fifties. Barham (2008:7) claims that the highly

qualified are more likely to have rewarding work experiences and retire early for positive reasons. In contrast:

the unqualified are the least likely to have positive experiences of work and job change, and are much more likely to leave employment for reasons beyond their control.

(Barham, 2008:7)

Finally, Hansen (2001:1) challenges the individualistic, democratic, information society that focuses “mainly on finding a job for self-satisfaction and less on using talents for the common good”. Hansen’s Integrative Life Planning (ILP, 2001:1) model offers a holistic integrative approach that stresses the need for creativity and flexibility in work and life management in times of change and transition. In ILP, six tasks are identified, both internal and external to the client, which concentrate on the development of the human being in a changing society. The six tasks are personal development, spirituality, pluralism and inclusivity, family, work environment and managing life transitions. Hansen argues that US public policy and legislation concentrates on the investment of human capital for economic progress and ignores educating people for broader career and life planning decisions (p.2).

### **3.4 The Concept of Lifelong Learning for Adults**

As stated earlier in 3.2 the concept of lifelong guidance has become intertwined with lifelong learning as more adults change careers and the marketplace dictates “flexibility in new skills acquisition, upgrading and multi-skilling” (McNamara, 1998:2). Guidance is fundamental to lifelong learning to support the development of “human potential, social inclusion, employability and economic prosperity” (NGFa, 2007:i). In Irish policy discourse the concept of lifelong learning is represented as a process of learning from the “cradle to the grave” that entails the implementation of education strategies adaptive to the needs of the learner (DES, 2000:32).

In response to the rapid economic and social pressures of globalisation and ambiguity about the future, lifelong learning is now disseminated within national and international policies as a ‘truth’ (Nicoll & Fejes, 2008:1).

Nicoll & Fejes state:

Policies argue that if economies are to remain competitive within global markets and societies continue to cohere, then lifelong learning as a capacity and practice of individuals, institutions and educational systems must be brought forth in the construction of learning societies.

(Nicoll & Fejes, 2008:1)

This argument is reflected in international thinking and the discourse of a series of international organisations that include the United Nations Educational, Scientific and Cultural Organization (UNESCO), the OECD, the European Union (EU), the Council of Europe and the World Bank (Tight, 2002:37).

The change in the terminology of adult education over a long period of time signifies the shift in the perspective of educationalists and policy-makers (Jordan et al, 2008:128). The concept of lifelong learning emerged first in the 1960s and 1970s, but returned with greater force in policy and education discourse in the 1990s (Tight, 2002:39). This was primarily due to the economic recession of most Western economies from the mid-1980's (Merricks, 2001:9). In the context of this research, the emergence of lifelong learning in Irish policy discourse can be found in the *White Paper on Human Resource Development* (DEE, 1997) and *Learning for Life: White Paper on Adult Education* (DES, 2000).

In the knowledge economy of Western Europe lifelong learning is now being promoted as the instrument through which people become and remain employable throughout their working lives (Jarvis et al, 2003:6). Jarvis et al state that this has resulted in the expansion and diversity of learning opportunities over the last number of years, particularly those that cater directly to upskilling the workforce. However, the qualities that people need to develop through learning are altering with the major changes in the typical life career and the rapid extension of the lifespan (McNair, 2001:25). As social inclusion becomes a priority the level of skill requirements is increasing and there is a greater emphasis on qualities such as self-management, self-confidence, negotiation and critical thinking. For example, the recent *Leitch Review of Skills* (2006) recommends a

doubling of attainment at most levels if the UK is to commit to becoming a world leader in skills by 2020 (Leitch, 2006:3).

Jarvis (2001:31) contends that the discourse on lifelong learning has been controlled by the discourse about work and therefore its meaning is limited to work-life learning. Similarly, from an Irish perspective, Fleming (2008:1) queries whether the demand for work-related learning can “be balanced by the requirements that a democratic society has for critical, active citizens”. Furthermore, in terms of poverty reduction, the public value of lifelong learning in the form of personal, social and economic benefits is difficult to measure (Sabates, 2008:2). Sabates claims that there is an absence of “empirical evidence investigating the role of lifelong learning in providing individuals with autonomy, power and a sense of control over their lives” (p.20).

#### *3.4.1 Lifelong learning, individual mobility and the knowledge economy*

Underlying the functions of education are a number of social control processes that include the maintenance and reinforcement of social order and cohesion, the management of people’s aspirations and the production of a skilled workforce (Jarvis et al, 2003:18). Intrinsic to this is the idea that the expansion of knowledge through education has a direct link with economic growth (Vaizey & Debeauvais, 1961:37).

From a functionalist perspective, Havighurst (1961:105) contends that social mobility, social change and education are interrelated defining socio-economic mobility as mobility in a scale of occupational prestige. Upward and downward mobility is directly related to access and attainment in education (p.120). Such perceptions continue to have relevance as “for the foreseeable future, education will be tied closely to people’s perceptions of social and occupational mobility” (Courtney, 1992:xv). Although early functionalist concepts owe much to contemporary thinking about the distribution of skills and rewards in a modern society, such as the United States, it would still appear that these unexamined assumptions suggest liberal democratic capitalist societies are working if the few from certain social classes are moving upwards (Courtney, 1992:130).

The rationale of current EU policy-making is that greater geographical and job mobility will enable the European economy to become more adaptable and “drive change in a competitive global economy” (Vandenbrande et al, 2006:4). Central to EU policy initiatives on labour market mobility are a range of education and training measures including raising participation in lifelong learning and skills development. Nihof (2005:402) states that the European Employment Strategy (2001) is based on the four pillars of employability, entrepreneurship, adaptability and equal opportunities. Skills development for active participation in the knowledge society and economy, and the rethinking of guidance and counselling are two key messages of the Strategy.

However, Sultana (2008:16) states that the discourse around the need for lifelong learning, training, and guidance in relation to ‘knowledge-based economies’ is viewed with caution in some quarters. Nihof (2005:409) argues that “knowledge has always been distributed unequally, although economists present it as a commodity that can easily be bought and sold”. The basic rationale behind this is economic dualism, which is “people becoming knowledge workers with the speciality of making and applying knowledge” (p.409). Similarly, Jarvis (2007:126) argues that the increase in governmental funding for education has led to the commodification of learning as employers now demand a better educated and innovative workforce. The outcome is a knowledge economy in which only “specific forms of knowledge are being utilised”.

Furthermore, Nihof (2005:408) claims that the “cult of the knowledge economy” is leading to a focus on competitive individualism which may affect certain sectors of society. It will create wider gaps between skilled and unskilled workers and cause increased social exclusion and a lack of social capital in the future. He argues that a learning society should deliver social cohesion, social justice and economic prosperity to all of its citizens rather than wealth to a minority.

From an Irish perspective, Lynch (1999:187) argues that the Irish economy is more reliant on knowledge based capital than other economies for a variety of historical and

political reasons. As Ireland “lacks the industrial infrastructure that underpins the powerful economies of core capital states”, increasingly credentialised knowledge has now become a major form of capital (p.187). However, whilst adults from upper-socio economic groups are more likely to have availed of higher education opportunities or have the financial capacity to do so, working class adults do not have equal access to education. Consequently, “their contribution to society and the economy has been greatly circumscribed by the lack of opportunity to develop knowledge-based capital” (p.187). Likewise, mobility, both on the labour market and across borders, is more easily accomplished by the young, the better off and the well educated (Vandenbrande et al, 2006:70).

### 3.4.2 *Participation in lifelong learning*

Blaxter et al (1998:135) state that there is now an expectation that adults will participate in education and training throughout their lifetime as there is a belief that learning “makes individuals more productive, more adaptable and better citizens, and thus promote the national economy and social well-being”. Even though there has been much research in the areas of *education and work*, *work and adult life*, *education and adult life*, there is a dearth of research on the interlinking of education, work and adult life and the meaning adults give to education in relation to other aspects of their lives (work, family and other roles) (p.137). Greater attention also needs to be given to the role of education at various points in people’s lives, and their perceptions of how far education has changed them (p.146).

With regard to adults engaging in education, Knowles’s (1984:9/12) andragogical model puts forward a number of assumptions about adult learning:

- Adult learners are self-directing.
- Adult learners have more practical and life experience to bring to education.
- Adults are ready and motivated to learn when they have an expectation that their learning will be immediately applicable to their lives.

However, Knowles's theory of andragogy can be critiqued for its prescriptive approach, its focus on individualism and its empirically unproved assumptions (Reischmann, 2004:4; Brookfield, 1986:91). In terms of educational guidance, one of Knowles's basic assumptions is that all adults are self-directed and educationally goal-oriented which may not always be the case for adults seeking guidance intervention. Indeed, adults bring a range of complex personal issues to educational guidance and new learning environments.

Knapper & Cropley (2000:52) contend that new learning requires greater cognitive effort from adults as "past learning to a considerable degree guides or even controls present learning". Resistance to change is encouraged by complacency, fear of failure and unwillingness to accept the social status of a beginner (p.52). Personal history, such as negative perceptions from earlier education experiences, can also inhibit change. Kelly (2004a:46) states that mature students can experience a range of academic and personal challenges including poor coping skills, financial issues, unrecognised learning difficulties, juggling of commitments, and a lack of confidence in their ability to learn compared to mainstream students. For literacy students, in particular, the issues can be even more complex and demanding. Kennedy (2006:77) claims that such issues can involve a persistent personal struggle to grasp reading and writing skills. In addition, the presence of adverse school learning conditions can become entangled with self-protective mechanisms and a non-productive engagement with the task of literacy learning.

Courtney (1992:50) argues that as the psychological motivation of adults engaging in education is more likely to be a 'continuing' rather than a 'compensatory' venture, the vocational motive is often dominant. Additional motives can include a desire to progress in the world, become better informed and a desire to meet new people. On the other hand, Tennant & Pogson (1995:97) argue that in determining motivation for learning, adult development also needs to be understood in terms of non-normative life events such as unemployment, health, migration, divorce, and not just prescribed age-graded stages as before.

Adults may often pursue education for the achievement of higher levels of self-actualisation. This concept is found in the humanistic paradigm which views the person as a whole being affirming the idea that people have the capacity to grow and change in order to reach their full potential. Maslow's (1999:168/170) 'hierarchy of needs' theory proposes that people have to satisfy their basic needs first, such as food, security, protection, and love, before they can achieve self-actualisation. Maslow states that whilst self-actualisation is also called self-realisation, integration, individuation, and autonomy, all these terms amount to "realizing the potentialities of the person" (p.169).

In contrast to Maslow's goal-oriented theory, Carl Rogers's (1965:489/90) person-centred theory proposes that higher order needs, like the need for self-actualisation, are fundamental to human beings for their psychological health and personal development. However, while the person-centred approach has been used widely in educational guidance, it misses out on the wider patterns of participation and societal change. The emergence of the information society, social dislocation, unemployment, cultural differences and changes in work structures and gender roles have all impacted on people's lifestyles and value systems (Knapper & Cropley, 2000:17).

Finally, an alternative argument for understanding human motivation and performance in relation to adult learning and career development is offered by Csikszentmihalyi's (2002) theory of 'optimal flow'. Csikszentmihalyi & Csikszentmihalyi (1988:16) claim that psychology's reductionist viewpoint of human behaviour, based on the satisfaction of needs and rewards, does not account for:

those rare but extremely significant instances in which people decide to contradict those 'forces' that in ordinary circumstances appear to determine their behaviour.

(Csikszentmihalyi & Csikszentmihalyi, 1988:16)

The concept of optimal flow is synonymous with intrinsic motivation. The 'flow' is an experience which is symptomatic of a poor fit between the person and the situation which interferes with performance, for instance, in learning or work situations. Talent, creativity and flexibility emerge when individuals invest their psychic energy in the

pursuit of consciously chosen and realistic goals (Csikszentmihalyi, 2002:6). Ultimately, optimal flow maintains people appear to be happier and perform better when they have found something they love doing and feel challenged by it. Optimal flow theory might have relevance for guidance work through the enablement of clients to pursue challenging, rewarding and realistic options for their own wellbeing. Nevertheless, it may take adults a long time to experience such optimal flow, if ever, and it may be influenced by intrinsic and extrinsic factors including self-concept, abilities, societal influences and the opportunity structures available to them during their lifetime.

### **3.5 Conclusion**

This chapter has addressed definitions of adult educational and career guidance and its broader conceptualisation within the context of lifelong guidance intertwined with lifelong learning. It has examined the current policy discourse on adult guidance together with the critical discourses in the field that challenge the economic model of policy-makers in the evaluation of guidance outcomes. The chapter has also examined the major theoretical perspectives that have informed adult educational and career guidance practice in the last one hundred years. Finally, it has attended to a number of contemporary issues related to the participation of adults in lifelong learning activities.

Chapter 4 scrutinises in more detail the relevant literature on the topic of measuring individual progression in longitudinal tracking systems in adult guidance contexts. An overall summary of the reviewed literature which addresses the major issues and debates on the topic in the field is provided at the end of Chapter 4.

## Chapter 4: Literature Review: Measuring Client Progression in Longitudinal Tracking

### 4.0 Introduction

This chapter investigates the discourse on measuring progression as an outcome in longitudinal tracking systems in adult educational guidance. A number of important issues on the measurement of progression outcomes as part of the quality assurance process in guidance are examined in this chapter. These issues relate to definitions, types, rationale, and methodologies. This chapter also considers the ‘voice of the user’ in the design of longitudinal tracking systems in adult educational guidance. An overall summary of the two literature chapters (3 and 4) is provided at the end of this chapter.

As part of the extensive literature review (2006-2008) I conducted a scoping of guidance-related documents in order to gain a more in-depth understanding of the current issues on quality assurance and outcome measurement in the field. The cross-sectional analysis of the twenty-one documents encompasses national, European and international perspectives. The twenty-one documents include research reports, as well as reviews and reports on best practice in the field. See *Table 4.1* for an overview of the range of documents. A full scoping table with analysis is presented in *Appendix B*.

*Table 4.1: Overview of documents in scoping analysis*

<b>Type of Approach</b>	<b>Authors</b>
<b><i>Purely quantitative research</i></b>	SPSS Irl. Ltd. (2005); Taylor et al (2005); Tyers & Sinclair (2005); Killeen & White (2000).
<b><i>Quantitative and qualitative research</i></b>	Hearne (2005); Magnusson & Lalande (2005); MM Consultancy (2003).
<b><i>Purely qualitative research</i></b>	Bimrose et al (2004; 2006a); Chiousse & Werquin (1999).
<b><i>Meta-analytic research</i></b>	Access Economic Pty Ltd. (2006;); Hughes et al (2002); Oliver & Spokane (1988); Spokane & Oliver (1983).
<b><i>Best practice</i></b>	Hutchinson & Jackson (2008); Bimrose et al (2006b); den Boer et al. (2005); Hawthorn & Ford (2006); Henderson et al. (2004); Hughes & Gratton (2006); Watt (1998).

The criteria used to scrutinise the documents were country of origin, rationale, funding providers, key findings and supports/gaps in the context of the topic of this study. This detailed information is available in the scoping document in Appendix B. My analysis of the documents indicates that there is a significant move towards the generation of evidence-based outcomes in the evaluation of guidance to inform future policy-making and practice. This involves the development of sophisticated performance indicators and benchmarks for quality assurance in the sector. However, there are noticeable differences across the documents in relation to the value placed on education, employment and personal outcomes as a consequence of guidance intervention. These themes are addressed in more depth in this chapter.

#### 4.1 Quality Assurance in Guidance

Quality assurance (QA) refers to the use of quality systems and quality standards through audits, checks or evaluation in an organisation. Within this context, indicators and benchmarks can be used to determine impact and set standards that need to be sustained. In recent years, across the Irish Public and Civil Service, including the Irish education sector, there has been an increasing demand for the implementation of quality standards (NGF, 2007c:9). In career guidance, quality issues have become linked to broader social and economic goals determined at policy level. The NGF states that the implementation of quality standards in guidance is deemed necessary to meet the “needs, demands and expectations of individuals” at all levels of provision (p.9).

Quality standards in guidance provide criteria and measures to assess whether quality is being achieved at a policy level as well as within individual organisations (Watt, 1998:15). Watt claims that quality is measured for a number of reasons: political (justification of service); funding (worthiness); measurement of client progress (advancement); service improvement (standards); monitoring (what is happening); strategic planning and practice/policy development. However, UDACE (1986:91) stresses that quality assessment should focus on the “extent to which clients have increased their ability to make effective choices about ways of meeting their learning needs”. Quality needs to be based on the clients’ perceptions rather than the providers.

From a policy perspective, the OECD (2004b:132) states that “quality standards can cover not only career information and staff competencies but also service delivery”. In terms of delivery, such standards can apply either to the processes used to deliver career guidance, or to the outcomes expected from provision. The OECD proposes that:

- 1) Generic standards are applied to a wide variety of activities, of which career guidance is only one.
- 2) Standards are developed for a particular sector (e.g. of education) which includes guidance amongst its range of activities.
- 3) Standards are developed specifically for the career guidance field, with an accreditation procedure to enforce them.
- 4) Voluntary guidelines are developed for the career guidance field, which services can adopt and apply if they so wish.

(OECD, 2004b:132)

Nonetheless, despite these propositions, the reality is that “there is little regular and systematic analysis of the quality of guidance” across twenty-nine European countries involved in the international reviews of career guidance policies (Sultana, 2004:97). Sultana claims that a number of deficits have been found in approaches to quality assurance including the tendency towards quantitative analysis which misses out on processes; evaluation of guidance is conducted as part of an overall range of services; and quality frameworks tend to be voluntary rather than mandatory and operate as a set of guidelines. An Irish example of this is the guidelines for post-primary schools issued by the NCGE. Sultana argues that it is now necessary that policy-makers and stakeholders are provided with evidence for a “comprehensive understanding of the overall picture of provision, as well as the effectiveness of that same provision in meeting public policy objectives” (p.99).

The OECD’s *Career Guidance: A Handbook for Policy Makers* (2004a) aims to address the diffuseness of approaches by providing a series of recommendations for quality standards in practice. Pertinent to this research study, three of these OECD recommendations are:

- 1) The establishment of quality standards against statements of service for clients, and the introduction of user monitoring and feedback mechanisms to ensure that such standards are met.
- 2) The use of quality standards as criteria for establishing performance targets for organizing service evaluation and inspection, and as mechanisms for monitoring and feedback.
- 3) The involvement of users in the design, implementation and evaluation of quality assurance systems.

(OECD, 2004a:58)

Specifically, in relation to the third point, the aim of this study is to examine the contribution of the user, the client, to the design of quality longitudinal tracking systems as part of the wider quality assurance process in adult guidance in Ireland.

#### *4.1.1 Examples of quality assurance models, standards and guidelines*

Prior to the publication of *Guidance for Life: An Integrated Framework for Lifelong Guidance in Ireland* (NGF, 2007a) five examples of quality assurance (QA) models, standards and guidelines were examined to determine what is being used at a national and

organisational level. These five were from Denmark, Scotland, the UK, and the Republic of Ireland. The sixth document, *Quality in Guidance Report* (NGF, 2007c) was included later. The six examples highlight different levels of breadth and transparency in their approach to quality assurance measures in guidance-related activities.

(i) *Denmark: Indicators and Benchmarks in Guidance Provision*

Denmark's commitment to guidance provision is high, as evidenced by the Danish parliament's new Act on Guidance in 2003. In August 2004, "a simpler and transparent guidance system was launched" (Danish Ministry of Education, 2004:1). A quality assurance system has been introduced that will contribute to higher quality standards by registering all guidance activities and the outcomes and effectiveness of provision. The country report *Indicators and Benchmarks in Guidance Provision in Denmark* (2005) sets out clearly how this will be achieved. It lists a number of requirements (including indicators and benchmarks) that need to be achieved by the particular guidance centres, such as Youth Guidance (up to 25 years) and Regional Guidance (youth education programmes and adults entering higher education).

Assessing the benefits of guidance will be carried out by 'Statistics Denmark' through yearly tracking of pupils' progression through education and on to training or employment, using a pupil's personal identification number. Adults receiving guidance through the regional centres will be similarly tracked. At the moment, data is only available for 2000-2003, so no information on the effects of the reform have yet been gathered. To date, targets and benchmarks have not been set, but a monitoring system is in place for their future development. It would appear that monitoring of provision will be quantitative in nature. There is no mention of qualitative analysis at this point, but that may be at the discretion of the particular guidance providers. However, this type of quality assurance tool provides a national model of long-term tracking of education, training and employment progression, from an early-age within the school system and onwards into adulthood using a personal identification number.

(ii) *Scotland: Careers Scotland Quality Assurance Framework*

Recent developments in career guidance provision and structures in Scotland provide an example of a model of quality assurance instigated at a national level. Careers Scotland, now part of Skills Development Scotland, was established in 2002 and involved the merging of over 80 previously separate organisations. An independent review was completed in 2005 with a resultant report entitled *Progress and Potential: A review Benchmarked against the OECD Career Guidance Policy Review* (Watts, 2005). The review followed closely the methodology used by the OECD in its international review of career guidance provision. The Scottish review has benchmarked Careers Scotland against the six challenges to policy-makers identified by the OECD. One of the key challenges is “developing better quality assurance mechanisms and linking these to the funding of services” (OECD, 2004b:148). This indicates a direct link between the maintenance of quality standards and the funding of Scottish guidance services.

To support quality assurance a set of Careers Scotland Quality Standards have been developed to ensure consistent and reliable service delivery and the achievement of intended career outcomes for clients (Careers Scotland, 2007:2). Impact measures for the client will be assessed at four levels, satisfaction, learning, behaviour (intention to change) and results (actual change). Impact evidence will be provided through “Customer Tracking, Customer Follow Up, Evaluation Activity, School Leaver Destination Report and Performance Reporting” (p.3). However, even though these activities will require the participation of users, the Careers Scotland Quality Standards document does not specifically mention the involvement of users in the design or implementation of future quality assurance measures.

(iii) *United Kingdom: The matrix Quality Standard*

In the United Kingdom, quality standards for career guidance delivery were initially established by the Guidance Council but are now managed by the Employment National Training Organisation (ENTO) through the *matrix Quality Standard*. The matrix Quality Standard is a “unique quality framework for the effective delivery of information, advice

and/or guidance on learning and work” (ENTO, 2005:2). The standard contains eight generic elements related to some of the key processes in an organisation or service. At least five of these are directly related to how individuals are helped, as in, accessibility, how information is provided and support in exploring options. In order to determine effectiveness, two of the key elements (7 & 8) focus on feedback from users and continuous monitoring, evaluation and action. Whilst it does not directly mention client monitoring, perhaps this may be achieved at the discretion of the individual organisation as part of element 8 through its “evaluating the effectiveness of the service and planning improvements” (p.2).

Currently, there are 2,145 organisations accredited to the matrix standard. These include career guidance services, education and training providers, voluntary organisations and small businesses. Career guidance organisations wishing to obtain government funding for provision must possess such accreditation. The benefits of having such a standard are described in terms of improved systems, better deployment of resources, continuous striving for improvement and ongoing development informed by the users. As accreditation reviews are carried out by ENTO, this ensures that quality standards are consistently maintained. However, as the average time for assessments takes between six and nine months it could prove financially restrictive and time-consuming.

(iv) *Ireland: EGUIDE Quality Assurance Model*

The EGUIDE Quality Assurance Model (2006) is an example of a model used by an employment support organisation. The EGUIDE is a Leonardo da Vinci-funded pilot project operating in conjunction with transnational partnerships and coordinated by the Ballymun Job Centre in County Dublin. The project caters for the disadvantaged job seekers and those in low skill employment. The EGUIDE project’s aim is to develop and implement a quality assured guidance system to guide and support the quality of the service offered by professionals working with disadvantaged job seekers to ensure consistency of approach. As a reference point for its QA model the project is using the *Technical Working Group on Quality in VET; A European Common Quality Assurance*

*Framework* (Faurischou, 2003). The EGUIDE has an inbuilt mechanism for the involvement of users in the design, implementation and evaluation of follow-up procedures in the guidance process. In addition, the development of a range of appropriate assessments is being undertaken which will be available on a web-based portal for users of the project.

The EGUIDE QA model includes a matrix of six guidance steps:

- promotion of the service;
- welcome to the service and information provision;
- consultancy;
- decision-making;
- implementation of career plan; and
- follow-up.

This matrix is based on the five criteria suggested by the VET (Faurischou, 2003:8) model: purpose and plan; implementation; assessment and evaluation; feedback and procedures for change; and methodology. The methodology for ‘follow-up’ or tracking procedures uses both quantitative (statistical analysis) and qualitative indicators (questionnaires, surveys, one-to-one meetings) that involves staff, practitioners and the clients. The involvement of the users of the Job Centre in the design, implementation and evaluation of follow-up procedures shows that it is possible to engage clients in the quality assurance process.

(v) *Ireland: AEGI ISSEE Quality Guidelines for Adult Guidance*

From 2000 to 2008 the AEGI used the *ISSEE Quality Guidelines; Quality Development in Adult Guidance* (Centre for Education and Training Development Partners, 2000). The guidelines provide a framework for developing quality and a threshold or baseline provision related to the framework for the delivery of adult guidance-related activities (p.8). Even though the guidelines represent a development tool which can be used to improve the quality of all aspects of adult guidance provision, processes and procedures it

does not provide practical information on carrying out service evaluation apart from advocating self-assessment as the most appropriate method. The vagueness on self-assessment methods in the ISSEE guidelines may mean that services have had to develop their own individual evaluation methods, and as a result there may be considerable variations across the AEGI services. The ISSEE guidelines suited the requirements of the AEGI during the inception and roll-out of services. Reporting procedures have since changed and the Department of Education & Science (DES) now has direct access to quantitative information on client activities through the national AGMS database. Since 2008, the AEGI has operated within the new *Quality in Guidance Guidelines* (NGF, 2007c).

(vi) *Ireland: NGF Quality in Guidance Guidelines*

As a response to the need for greater accountability, recommendations have been made to implement quality standards and evaluation procedures across the Irish guidance sector (NGF, 2007c:9). The NGF recommends that evaluation should use both quantitative and qualitative methods and should ideally include both self-assessment (client satisfaction data) and external assessment (evidence of market research and promotion). Furthermore, consideration towards the use of publicly recognised external accreditation such as ISO and the Q-Mark (*Excellence Ireland Quality Association*) in the guidance sector is advocated.

The new NGF *Quality in Guidance Guidelines* provide a framework for developing quality guidance activities, and a code of principles from the client's perspective. Nine principles have been created to underpin the guidance service and form the basis on which quality is assessed which include accessibility, appropriateness, confidentiality within the law, impartiality and quality standards of service. In relation to quality, standards should include clarity of service provision to the public, accurate and up-to-date information, complaints procedures, suitable skilled staff and appropriate facilities for target groups (p.18). However, as the NGF document provides 'general' guidelines

rather than specific guidelines there is a lack of clarity as to how impact measurement, as part of the self-assessment process, ought to be conducted in a guidance service.

To summarise, these six examples provide a small indication of the types of quality assurance mechanisms being used at a national, organisational and service level in different countries and guidance settings. The direct involvement of the ‘user’ in the QA process varies across the six examples. From a bottom-up approach (service level) the EGUIDE provides the only example of engaging the user in the design of quality systems. At a more abstract level, Denmark and Scotland are two country models that refer to user involvement through tracking, monitoring and impact measurement. The matrix Quality Standard is a generic framework that contains elements of user feedback and monitoring at the discretion of the guidance service. From an Irish perspective (AEGI ISSEE and NGF *Quality Guidelines*), even though self-assessment is recommended as the main form of evaluation in these ‘general’ guidelines, both documents are vague on user involvement to measure and evaluate the long-term outcomes of adult guidance provision. According to the AEGI National Co-Ordinator, the NCGE is now working with the AEGI Advisory Group to develop a generic QA model for all of the AEGI services based on the NGF’s *Quality in Guidance Guidelines*.

#### *4.1.2 Quality standards and impact measures*

The vagueness of the NGF quality guidelines is a concern as QA and impact measurement of guidance interventions is “multi-faceted and complex” (Bimrose et al, 2006b:i). Sultana (2008:44) argues that QA is “central both from the perspective of the citizen, and for reasons of efficiency and accountability in use of public funds”. He states that the three key approaches to draw on are administrative-centred, practitioner-centred and user-centred. Quality approaches are defined by Faurischou (2003:5) as:

Any integrated set of policies, procedures, rules, criteria, tools and verification of instruments and mechanisms whose collective purpose is to ensure and enhance the quality provided by any Vocational Education and Training (VET) institution.

(Faurischou, 2003:5)

Bimrose et al (2006b:4) state that QA models vary and include approaches that seek to:

1. Standardise the process of organisational self-assessment (e.g. EFQM Excellence Model, TQM Total Quality Management).
2. Measure the effectiveness of IAG based upon ‘ideal input’ factors (e.g. Mayston (2002) economic model).
3. Gather evidence to demonstrate accountability (e.g. Sampson et al (2004) Cognitive Information Processing approach).
4. Distinguish between the various input, process and outcome factors involved in the deliver of IAG (e.g. den Boer et al (2005) Indicators and Benchmarks for Lifelong Guidance).
5. Apply a tri-variable model of QA to IAG (Evangelista (2003) Tri-variable Model).

(Bimrose et al, 2006b:4)

Whilst four of these five approaches are directly related to guidance practice, the use of standardised quality systems such as EFQM or TQM is not ideal as they are not focused on career guidance and may be time-consuming for services (Plant, 2004:149). Even though different models do exist in practice, QA in career guidance is more often conceptualised in terms of an input-process-output/outcome model (Bimrose et al, 2006b:4; den Boer et al, 2005:13). This model is displayed in *Table 4.2*.

*Table 4.2: Categorized areas for possible indicators in lifelong guidance*

	<b>INPUT</b>	<b>PROCESS</b>	<b>OUTPUT</b>
<b>Individual service level</b>	Number and characteristics of users (demographics)  Qualifications of staff	Content of services (time allocation, guidance activities, means of provision)	User satisfaction  Personal development  Policy related outputs (commencement and completion)
<b>Organisational level</b>	Time and money available	Quality management and delivery	
<b>National Level</b>	Financial means Policy	Coherence of policy	

(Adapted from den Boer et al., 2005:13)

Inputs and processes are defined in the form of organisational service level standards. Inputs include demographics of service users, practitioner qualifications, accommodation and costs. Process includes content of service provision, intervention procedures and quality assurance. However, different views are adopted in the literature on the terms ‘output’ and ‘outcome’. For example, den Boer et al (2005) and Plant (2004) use the term ‘output’, whereas Bimrose et al (2006b) and Watts & Dent (2006) favour ‘outcome’.

Output is referred to as “number of people taking up/job/training/education, cost/benefit, value for money” (Plant, 2004:151). Outcome factors are often defined in the form of predetermined performance targets or indicators and can include user satisfaction levels, extent of personal development, and percentage of users progressing on into education, training and employment (Bimrose et al, 2006b:5).

Den Boer et al’s (2005:12) model was developed from a literature review of the key issues in lifelong guidance. They argue that defining potential indicators in relation to organisational and national outputs is much more difficult and potentially dangerous. Den Boer et al. claim that:

Indicators for Educational and for Social and Economic outputs and outcomes on National level are available for Europe. The relationship between guidance and any of these indicators are indirect.

(den Boer et al, 2005:12)

Furthermore, den Boer et al (2005:12) argue that such outputs and outcomes are influenced by many factors other than guidance. Unfortunately, they do not provide any indication of what these factors may be in their proposed model.

Dewson et al (2000:2) explain that:

there is interplay between indicators and outcomes, in that indicators are the means by which we can measure whether the outcomes have been achieved.

(Dewson et al, 2000:2)

However, with regard to QA approaches in guidance, there is still a lack of clarity in public policy and legislation on the “expectations about performance indicators and evaluation procedures” (Herr, 2003a:15). Despite exhortations that indicators and benchmarks are an essential part of monitoring performance and progress towards EU objectives, progress is still slow in the development of performance indicators in the guidance sector (Hughes & Gratton, 2006:2). It has been determined that “the lack of data at European level preclude the possibility of introducing an indicator or benchmark on guidance in the short term”, (den Boer et al, 2005:6). With regard to the measurement

of output, it is envisaged that “using and standardizing user satisfaction forms could be a first step” (p.33).

In the field of education, indicators describe the performance of the given system (Scheerens et al, 2003:208). Defining the term ‘indicator’ involves a number of relevant characteristics (den Boer et al, 2005:36). Even though indicators capture key aspects indicative of a well functioning system, they only provide an ‘at a glance’ profile. Even so, “this does not automatically imply that indicators are composite measures based on a specific analytic formula; they could also be variables”, (p.36). Indicators are quantitative (numbers) rather than qualitative (narrative), and can include scales for measuring competencies, ratings of processes and categorical data. In addition, Scheerens et al (2003:207) state that indicators allow for value judgements and, if not intrinsically evaluative, at least function in an evaluative context. This includes the use of indicators as part of monitoring, which stresses “ongoing information gathering as a basis for management decisions, a reliance on administrative data and a stronger pre-occupation with description than with valuing” (p.3). In some applications indicators have an ‘in-built’ evaluative element, with specified norms and standards (den Boer et al, 2005:36). Den Boer et al. explain that norms or standards specify threshold values on a certain dimension or criterion and are also known as *benchmarks*. A benchmark in guidance is a standard by which something can be measured or judged.

A range of critical perspectives on the use of quality standards, indicators, and outcomes in guidance highlight tensions in the discourse in relation to quality assurance processes. Quality assessment is sometimes controversial, because it challenges existing values and conceptions about what constitutes high quality, and the distribution of power within an organisation (Brennan & Shah, 2000:14). The power issues embedded in efforts to implement quality standards in career guidance and counselling relate to “who defines, maintains and, in particular, controls such guidelines or standards” (Plant, 2004:141). Plant states that the present focus on quality issues in guidance is connected to a number of societal trends which include new public management (decentralization and quality

control), value for money (cost-benefit) and professionalisation (skills and competencies upgrading) (p.142). Furthermore, Bimrose et al (2006b:8/9) contend that providing evidence on effectiveness is likely to vary at different levels. They assert that clients are likely to be concerned with access, managers with formative evaluation, practitioners with job satisfaction, and policy-makers tend to focus on summative evaluations and cost-benefit outcomes. Therefore, the challenge is to develop different types of evidence related to quality that satisfies the needs of different stakeholders. However, they claim that while inputs and processes are important in quality assurance terms, it is the 'end product' or outcome that is most critical. In other words has guidance "made a positive and meaningful difference to the client or customer and, if so, at what cost to the organisation?" (p.9).

From another stance, Herr (2001:3) queries whether reliable quantitative indicators can be developed to provide a measure of factors that are subjective and qualitative in nature, for example, independence and self-reliance. In addition, the role of the practitioner is queried by Hughes & Gration (2006:12) who assert the importance of:

giving practitioners a voice in the articulation and development of indicators, as well as in the analysis of the data generated, and the importance of developing evaluation frameworks that recognize the multi-faceted nature of guidance.

(Hughes & Gration, 2006:12)

Watts (1995:75) argues that "defining the outputs of guidance is notoriously difficult". He questions the use of client action plans as a method to measure progress which is driven by funding on the basis of outputs. The use of action plans for this purpose could undermine good practice, leading to concentration on quantity of throughput at the expense of quality and flexibility of service.

From a longitudinal perspective, Bimrose et al (2008:64) have found that an "accurate examination of the relationship between client action plans and the development of career trajectories has proved impossible". The variation in clients pursuing action plans over time can only be accounted for by changes in their circumstances and decision-making

(p.72). This would appear to imply that action plans alone cannot be relied upon to determine long-term outcomes as individual's career decisions and actions are liable to change over time.

#### *4.1.3 The 'voice of the user' in the QA process*

There is now a general consensus in the field that a more bottom-up, democratic approach to quality assurance and evaluation which involves the concerns of all stakeholders is required (Kelly, 2004b:533; Killeen, 1996a:333). This would need to involve the 'voice of the user' in the development of quality standards in guidance.

Bimrose et al (2008:91) contend:

Clearly, there is significant potential to harness the voice of the user by practitioners gaining consent for on-going follow up activities and securing testimonials on what does and does not work from a user perspective.

(Bimrose et al, 2008:91)

Yet, apart from current activity designed to gauge customer satisfaction, there has been a distinct lack of research on the role of the user in the quality assurance process (Plant, H, 2005:1).

Plant, H (2005:1) proposes two reasons for the involvement of guidance users in policy discussions in adult guidance. The first reason relates to active citizenship and participatory democracy. Within the context of adult education, citizenship refers to the active involvement of citizens in shaping the overall direction of society, culturally, socially, economically and environmentally (DES, 2000:29). The second reason relates to guidance policies and services meeting the needs of individuals and the community (Plant, H, 2005:1). Similar themes are found in the personalisation paradigm which has been proposed as a model for public sector management in the UK in recent years (Ravenhall et al, 2009:2). Ravenhall et al. state that the personalisation agenda adopts a 'bottom-up' approach that "focuses on government creating the environment for individuals to take decisions about their own lives" (p.2). The development of sustainable 'bottom-up' approaches which move beyond the provision of customer service-style feedback are required in the adult guidance sector (Plant, H, 2005:4)

Even though user satisfaction surveys are valuable for quality assurance, Plant, H (2005:4) stresses that:

they should not be conflated with the deeper, more creative and dialogical kinds of involvement that would signal a serious attempt to involve both users and non-users in the creation of policy and practice.

(Plant, H, 2005:4)

Plant, H (2005:3) explains that the purpose and scope of user involvement in guidance policy development, planning and decision-making can be represented at a number of levels. These are:

- **Individual level** – individuals are involved in shaping their own experience of using the service.
- **Service level** – service users and other interested parties suggest how to improve the operation of the service, set priorities, identify gaps, address unmet needs, and so on.
- **Strategic level** – participation and consultation at the wider strategic level of planning, developing and reviewing services.

(Plant, H, 2005:3)

The individual level relates to getting information, that is, being told what is available by the clients; and giving information, telling services what it is like to use them. At the service level suggestions for service improvement can be achieved through forums of debate such as workshops, focus groups and consultations. Lastly, the strategic level involves participation and partnership through allowing users to be involved in shaping and reshaping policies and strategies.

However, Henderson et al (2004:29) claim that examples of consumer-led models of QA are lacking in the field. They state a number of QA approaches have been identified including top-down, centralised approaches, top-down but segmented approaches (systems within education and employment ministries and services) and bottom-up approaches where initiatives have been promoted through professional bodies, codes of conduct and professional registers. With regard to a bottom-up approach, it is my understanding that this type of approach needs to be from the ground up (service level). Nevertheless, Henderson et al. find that all three approaches may include ways to consult users but their involvement may be restricted. They conclude that the engagement of the

user or citizen in the QA process could be achieved through the user as a source of information on experience and satisfaction of a service or representation in the management of a service. Alternatively, as is the case of this bottom-up research study, the user can contribute by providing an input into the design of a quality system in adult guidance contexts (p.15).

Allied to the notion of user involvement is the issue of the terminology used to describe users in relation to service provision, quality assurance and policy formation. Edwards et al. (1998:4) argue that discourses in guidance counselling overlap and interpenetrate each other and are diverse and contested. A case in point have been policies to introduce market mechanisms into guidance which have resulted in policy-makers and practitioners reconstructing clients of guidance services as ‘customers’ or ‘consumers’(p.4). This relates to the concept of a ‘market in guidance’ whereby market principles are applied to the improvement of quality standards in guidance delivery (Watts, 1995:71). Recently, the OECD (2004b:135) has called for the strengthening of “the voice of consumers in determining how services are organized and provided”. Disconcertingly, this type of discourse is indicative of an economic rationality that signifies clients as customers and consumers within an efficiency/productivity model that relates output to a given input, as demonstrated by Watts & Dent (2006:178). Even though guidance is a holistic process and practitioners continue to work from a code of ethics with clients, there is still a danger of distancing the client from the quality assurance process if it is underpinned by an economic model to evaluate the intervention.

#### **4.2 Evaluating the Effectiveness of Guidance**

There is now an increasing pressure to demonstrate inputs-processes-outputs in economically defensible ways in order to ensure continuance of funding in career guidance programmes (Sampson et al, 2004:268). Despite this, there has been little progress toward the development of accountability or evaluation models in career guidance regardless of public demands for accountability. One major difficulty has been the “absence of conceptual and operational constructs that define the outputs of career

service interventions” (p.268). Conversely, Bimrose et al (2008:81) challenge this viewpoint arguing that “different models have been applied to the planning, management and delivery of guidance services”. These approaches include models to assess various input, process, outcome factors in guidance delivery as discussed already in 4.1.2.

There is a misconception that evaluation and QA are similar or indeed the same thing (Killeen, 1996a:343). Killeen argues that:

The task of quality assurance should be to ensure that the conditions are reproduced under which guidance is known to be effective. If quality assurance is to reach its full potential in the United Kingdom, it should be developed in parallel with, and in close connection to, all kinds of outcome research, whether intended as ‘evaluation’ or not.

(Killeen, 1996a:343)

As evaluation provides the empirical ‘power’ to guide and justify professional programmes it is controversial in its purpose, the power relationships it manifests, and the manner in which it should be conducted (DePoy & Gilson, 2008:16; Killeen,1996a:331).

Of relevance to this research study is Killeen’s (1996a:333) observation that:

Conventionally, we have paid little attention to...clients or consumers, whose judgements are often sought and collated in the process of evaluation, but who are less often regarded as people who might require evaluation to be conducted in order to inform their own decisions about it.

(Killeen, 1996a:333)

Since guidance is an instrumental activity there is an implication that we can only know its worth through its effects, which seems to favour the process of summative judgement (Killeen, 1996a:335). In career guidance, policy-makers are more likely to be interested in summative evaluation whereas practitioners and service managers are more likely to be concerned with formative evaluation (Herr, 2003b:5). Summative evaluation is concerned with the “degree to which an intervention or programme meets its success criteria or overall worth”, (DePoy & Gilson, 2008:235). Formative evaluation refers to the “use of data about intervention input, conduct and output to inform intervention improvement”, (p.228). Killeen (1996a:335) contends that the difference in the two forms of evaluation lie in the lack of scientific propriety in formative evaluation and the rigour with which effects should be demonstrated in summative evaluation. The lack of

experimentalism in the latter may exclude practitioner evaluation for the purpose of demonstrating effectiveness. From a human resources perspective, evaluation can place an extra burden on guidance practitioners who have to deal with the practicalities of competing time and workload pressures (Bowes et al, 2001:8).

In addition, part of the reason for the current lack of sound evidence-based research is that evaluations of inputs-processes-outputs are difficult to accomplish. Guidance is difficult to observe directly. Also, because of the complex variables that impact on career decision-making causality is hard to establish (Sultana, 2004:99). Kidd (2006:76/79) proposes that evaluation of effectiveness can be conducted through either 'process research' or 'outcome research'. In process studies the researcher attempts to assess the therapeutic elements that are associated with change in the client. In outcome research, such as this study, the aim is to discover how far a particular intervention has helped the client, that is, the differences in the client before and after the intervention are examined, without identifying what actually happens within the counselling/guidance sessions. Kidd states that process evaluation work in career counselling in the UK is still very limited. By contrast, outcome research is becoming more prevalent as interest in the evidence underpinning practice has increased (p.79).

Finally, Chioussé & Werkin (1999:65) argue that evaluation is complicated by its serving two main goals which are the search for quality and the quest for profitability. In terms of profitability, cost-benefit analysis is more quantitative in nature and conducted primarily for the attention of policy-makers and funders. Chioussé & Werkin state that cost-benefit analysis "consists of determining the economic value of the services provided" (p.67). Three different types of evaluation are the conformity method, the control-group method and the monitoring method. Although all three have their advantages they only provide a 'partial' view, rather than a genuine evaluation of the services provided. In particular, monitoring methods which involve the users of services rely heavily on memory, understanding of the requirements, and willingness to participate (p.67).

#### *4.2.1 Outcome evaluation*

Despite the contention that career guidance interventions produce positive outcomes there is a dearth of ‘hard evidence’ to support this claim (Maguire, 2004:186). The measurement of outcomes is beset by difficulties and lack of agreement on common methods and standards in practice with a need for improvement in both quantitative and qualitative methods (Hughes & Gratton, 2006:1; Maguire, 2004:190). Watts & Dent (2006:187) state that “it is important that the data collected should relate not just to volumes but to quality” in publicly-funded guidance services.

In addition, definitional problems abound when addressing the area of measurement (Maguire, 2004:181). One issue relates to the definition of what guidance is, what it is intended to do, and the diffuseness of career guidance activities in the field. This has already been discussed in Chapter 3 (3.1). Another significant issue, and directly related to this research study, is the variances in definition and the value assumptions embedded in the discourses of policy-makers, theorists and practitioners on the topic of outcomes.

Tensions are evident in the different discourses on evaluating effectiveness in guidance. Even though policy-makers refer directly to the achievement of the three public policy goals, they also recognise that career guidance can produce a range of softer outcomes for individuals. For example, in some countries (Denmark and Norway) the goals of career guidance have to be centred on the individual, that is, personal satisfaction, improving career decision-making or contributing to personal development (OECD, 2004b:18). In addition, career guidance can bring about immediate attitudinal changes and increased self awareness, intermediate behavioural changes, for example, job search and longer-term outcomes such as success and satisfaction (p.33).

Nevertheless, Herr (2003b:1) argues that predominantly policy-makers expect two outcomes of career guidance services, the achievement of national policy goals and cost-effectiveness in service delivery. There is a tension between the ‘macro-economic’ outcomes required by policy-makers and the short-term ‘micro-economic’ outcomes

identified in practice. Specific macro-economic issues relate to employment, labour productivity, marginalisation of certain groups, effective use of resources and, in some cases, social justice. In contrast, micro-economic issues relate to the achievement by individual clients of learning and employment goals. However, with regard to economic outcomes, the quality of guidance has now become linked with its role as a 'market-economy' facilitator (Plant, 2004:153). Plant claims that the rationale for a number of specific guidance activities includes alleviating unemployment, flexibility in the labour market and supporting mobility.

Measuring the economic outcomes of guidance is problematic because guidance effectiveness research is usually short-term and focused on immediate effects (Hughes et al, 2002:10). Herr (2003b:1) argues that the assessment of outcomes for policy purposes requires a balance between two types of outcomes. The first type is related to individual learning and decision-making which are essential elements of career development and the targets of career guidance services. The second type are the outcomes which are directly related to the first such as education options, attitudes, interests, values, work skills and preferred economic and labour market outcomes mediated by efficiency and social equity concerns.

Nevertheless, given the competition for limited resources it seems likely that policy-makers will link resource allocations to priorities for service delivery and evidence of outcomes (Maguire & Killeen, 2003:6). It is becoming more likely that cost-benefit data will be of benefit to policy-makers in terms of *return on investment* to ensure efficiency and value for money in publicly funded career guidance services. For the moment Hughes & Gration (2006:10) claim that "there is even less evidence of data that links financial investment and costs directly to IAG *outcomes*, as opposed to levels of *service delivery*".

However, Herr (2001:1) argues:

The implementation of cost/benefits analyses as a national strategy has not become an empirical process, but rather a presumptive process; presumptive in the sense that benefits are expected to flow from the implementation of career services, although such hypotheses have not been tested.

(Herr, 2001:1)

In contrast, the cost-benefit analysis of the benefits of career guidance is espoused from an economic perspective by Mayston (2002:3). Specifically, in the context of unemployment, high quality career guidance is likely to have substantial *macro-economic* benefits. Such benefits relate to human capital and labour match and supply across different occupations and geographical locations (p.8). Mayston argues that there is a need to ensure *efficiency* and *effectiveness* in *resource allocation* in the public funding of career guidance services (p.1). In terms of outcomes/outputs he argues that:

Being able to assess the magnitude, and relative importance, of the different quantitative deliverables which career guidance might achieve in return for different levels of public funding is a key task in the development of evidence-based policy.

(Mayston, 2002:1)

In the UK, the focus on cost-benefit has led to increased levels of accountability with target-driven performance management influencing funding allocation in the sector. In the adult guidance sector, this has included the juggling of an “increasingly uncertain collection of funding sources to keep services afloat” (Brown, 2006:72). Furthermore, the assumptions underlying governance by targets represent synecdoche (taking a part to stand for a whole) disregarding problems related to measurement and gaming (cheating) by guidance providers in order to achieve the ‘desirable outcomes’ required by funders and policy-makers (Bevan & Hood, 2006:520). In Ireland, “uncertainty about funding after 2006 has made long-term planning of the AEGI very difficult and posed challenges to the development of adult guidance support services” (NGF, 2007a:37). In light of the current economic downturn, even though the demand for adult guidance could substantially increase, guidance may still have to prove its economic worth during a time of government cutbacks across the Irish education sector.

#### *4.2.2 Methodological issues in the evaluation of outcomes*

The central task of outcome research in guidance and counselling is to find suitable ways to measure change in clients (McLeod, 2003:121; Killeen, 1996c:72). In Ireland, the positivistic approach employed by the DES to measure the effectiveness of adult guidance intervention is synonymous with the pursuit of quantitative outcomes in the evaluation of guidance internationally. The emphasis on tangible outcomes, based solely on education and employment attainment, is proving inadequate as it neglects to capture the real experiences of clients. Even though practitioners, theorists and researchers acknowledge that these are highly relevant outcomes, consideration also needs to be given to a broader range of intangible outcomes reflecting the personal and social progression of the individual which may be unquantifiable using positivistic analysis.

This raises particular methodological issues for practitioners, service managers and policy-makers who have different interests in measuring outcomes (Herr, 2003b:4). From a policy perspective, there is a dearth of data available to provide an overall perspective on career guidance provision and assess how well it is matching public policy objectives (OECD, 2004a:60). Data collection tends to focus on “simple quantitative indicators, rather than more policy-relevant indicators such as client satisfaction or improved career decision making skills”, (p.60). There is now a call for methodological pluralism in the form of quantitative and qualitative studies to acquire an accurate impression of the range of outcomes, obstacles and contextual constraints that inhibit effectiveness and the achievement of outcomes (Kidd, 2006:87; Herr, 2003b:4).

Outcome research has been more deeply embedded in American career guidance practice where outcomes have been assessed through quantitative research methodologies, for example, Spokane & Oliver (1983), Spokane ((1991). In terms of the usefulness of guidance, Spokane & Oliver (1983:128) contend that “ascertaining why a client requests a vocational intervention is essential to determining the criteria for the effectiveness of an intervention”. Furthermore, Spokane (1991:215) argues that while naturalistic studies are

difficult and expensive to conduct, they are essential to progress in the field of career intervention research.

More recently, Whiston & Oliver (2005:162) state that “vocational psychologists have more information about the effectiveness of the broad area of career interventions than about specific effects of career counseling”. Nonetheless, they have found studies that do address career counselling outcome measures such as career maturity, career decidedness and career information seeking (Whiston et al, 2003, as cited in Whiston & Oliver, 2005:162). Furthermore, they argue that studies such as Oliver & Spokane (1988) have shown that career counselling can also have a positive effect on ‘noncareer’ outcomes such as self-concept, anxiety and depression. On the other hand, even though Whiston & Oliver view such outcomes as noncareer, clients seeking education or career guidance may have one or more of these psychological issues which are impeding change or progression which needs to be acknowledged. Overall, Whiston & Oliver’s (2005) findings support the prospect of developing a range of soft outcome measures to evaluate the effectiveness of guidance intervention.

Finally, from a national and European perspective, a fundamental methodological issue is the need for consensus amongst all stakeholders on the types of outcomes to be measured. This “would seem to be a pre-requisite of a genuine, concerted attempt to develop appropriate measures” to assess the impact of guidance for clients (Maguire & Killeen, 2003:17).

#### *4.2.3 Types of outcomes*

There is a divergence on the terminology used in outcome measurement and the value given to some outcomes over others by the different stakeholders involved. In Ireland, the NGF’s lifelong guidance framework proposes four groups of outcomes in the areas of knowledge, skills, and competencies outcomes (NGF, 2007a:15). The four groups are emotional, social, learning and career development. In general, outcomes are described as ‘immediate’, ‘intermediate’, ‘ultimate’, ‘quality’, ‘hard’ and ‘soft’ in the discourse.

A model for the analysis of guidance outcomes that encompasses both the *economic outcomes* of policy-makers and the *learning outcomes* of practitioners is proposed by Killeen (1996c:74). More recently, Kidd (2006:82) arranges the outcomes as follows:

- Immediate outcomes, e.g. the learning outcomes of self and opportunity awareness, and changes in attitudes and motivation in relation to work.
- Intermediate outcomes, e.g. better job search skills and a wider exploration of opportunities.
- Ultimate outcomes at the individual level, e.g. suitable career choices and enhanced take up of learning and work opportunities.
- Ultimate outcomes at the system level, e.g. increased labour productivity.

(Kidd, 2006:82)

However, evidence of the ultimate outcomes, which are directly related to the three public policy goals of learning, labour market, and social equity, relies “mainly on the demonstrations that effects on individuals eventually impact on labour market processes” (Kidd, 2006:86). Despite the lack of evidence for these ultimate economic outcomes, Kidd argues that the immediate effects of guidance are predictive of these kinds of ultimate economic benefits. She advocates the use of longitudinal studies to measure each type of effect and the progressive impact of interventions (p.86). In contrast, from a productivity perspective, Watts & Dent (2006:179) argue that “some take the view that an output measure designed to address impact should not focus on production outputs but outcomes”. They put forward four types of outcome measures: client satisfaction, learning outcomes, behavioural outcomes (immediate destinations) and economic and social outcomes.

The concept of ‘quality outcomes’ is found in the discourse of the International Symposiums on Career Development and Public Policy as a measurement of successful outcomes. Savickas’s (2001:1) assessment of international contributions on the topic finds that “policy makers and practitioners view quality outcomes from two distinct vantage points”. Policy-makers view quality outcomes quantitatively or objectively focusing on employment and educational outcomes, successful education-to-work transitions, labour market supply, economic development and social equity. In contrast, practitioners view quality outcomes qualitatively or subjectively focusing on job satisfaction, counselling goals, soft skills, adaptability, flexibility and personal

development. In this instance, quality outcomes can also be viewed as extrinsic versus intrinsic, such as success versus process, employer versus employee, and skills versus interests. Savickas argues that the immediate challenge for policy and practice is to reach an agreement on language and constructs that link the psychological and sociological aspects of interventions and outcomes. In addition, he advocates engaging with ‘users’ (the public) of guidance services for an understanding of their needs and expectations of quality outcomes.

On the whole, however, there is a strong prevalence in guidance and education discourse towards describing outcomes in terms of ‘hard’ and ‘soft’ outcomes. Distinctions between the two can be blurred at times but, in general, ‘hard’ refers to the tangible, objectives outcomes related to success or attainment in education, training and employment; whereas ‘soft’ refers to the intangible, subjective or personal outcomes experienced by the individual. By and large, the former outcomes are favoured by policy-makers; the latter are favoured by practitioners in the field.

Maguire & Killeen (2003:18) assert that research in guidance must encompass a whole range of both ‘hard’ and ‘soft’ outcome measures. They argue that:

It is difficult to see how studies of the impact of career guidance activity can be meaningful if they do not allow for what might constitute life-changing effects of interventions, which may or may not be readily apparent in terms of easily observable or tangible outcomes, such as the take-up of learning opportunities, or entry into employment.

(Maguire & Killeen, 2003:5)

Furthermore, as well as the two hard outcomes of education and employment, the third ‘hard’ outcome of the social benefits (equity) of guidance needs to be accounted for in outcome measurement (Maguire & Killeen, 2003:5). As guidance also has a role in reducing social exclusion through encouraging participation in learning and employment, such changes are not only of benefit to society and the economy but also to the individual’s quality of life.

From the practitioner's perspective, Bimrose et al (2004:75) highlight the delineation between hard and soft outcomes in the guidance process itself. In terms of hard data, most practitioners investigate their client's educational, training and employment history. Of the softer, attitudinal data, an exploration of client preferences related to courses, jobs, strategies, and options is undertaken. Practitioners use different methods to bring about some measure of change in the client's behaviour, attitudes and/or thinking which include information and advice giving and other influencing techniques such as challenging or self-disclosure.

In comparison to hard, quantitative outcomes, the measurement of soft outcomes is much more difficult as "they are subjective and qualitative in their essence", (Herr, 2001:3). From the client's perspective, soft outcomes can include improved clarity, increased motivation, self-confidence and greater self-awareness of skills abilities and preferences (Bimrose et al, 2006a:68). They can also include achievements relating to interpersonal, organisational, analytical and personal skills (Dewson et al, 2000:2).

In educational contexts, for example, increased self-confidence is the most frequently mentioned and most highly valued soft outcome amongst adult learners (McGivney, 2002:21). It is an important indicator of personal progression as it encourages more ambitious goal-setting and contributes significantly to people's employability and performance at work. Therefore, McGivney (2002:22) argues that a demarcation between hard and soft outcomes is difficult as they appear to be symbiotically linked. For many learners, and clients, new learning and skills acquisition create higher levels of self-worth and confidence which in turn can lead to progression in higher levels of education and employment. As the evidence indicates, softer outcomes enable and facilitate educational and economic progression, especially among new and more hesitant learners, they need to be valued as much as harder outcomes by government and funders (p.24).

In recent years the concept of *distance travelled* has emerged in the discourse as a measure to assess the impact of guidance interventions. *Distance travelled* refers to the "progress that a beneficiary makes towards employability or harder outcomes, as a result

of project intervention”, (Dewson et al, 2000:2). The concept serves to contextualise beneficiaries’ achievements in terms of the leap forward made in the acquisition of certain soft outcomes. Similarly, Bimrose et al (2008:6) argue that the measurement of the impact of guidance needs to take account of the distance travelled by clients, “in a way that focuses on the process of effective guidance, as well as its quantifiable outcomes”.

Dewson et al (2000:4) propose three benefits for measuring soft outcomes and distance travelled in employment (and guidance) settings which can be gauged at a *general level*, a *project level* and a *beneficiary level*. In relation to general benefits, hard outcomes are an insufficient indicator of a beneficiary’s increased employability, especially for target groups that face multiple barriers to employment; softer outcomes can provide a fuller picture of the impact of a programme. In addition, for national level evaluation, soft outcomes provide a fuller picture of the impact of a programme as a whole. At a project level, projects need to have in place systems to measure soft outcomes as they can provide further indicators of provision (p.4). Finally, as the “development and recognition of soft skills is part of many beneficiaries’ integration into the labour market”, the verbalisation of soft outcomes and distance travelled by clients can empower them and increase their self-confidence (p.4).

Brett et al’s (2008) recent impact study has served as a starting point to inform the development of a framework to measure the impact of career guidance within the new Adult Advancement and Careers Service (UK). Impact measure data refers directly to the ‘changes’ in client circumstances following a guidance session (Brett et al, 2008:2). Applying Killeen’s (1996c) outcome analysis model in the study, client case studies were used to highlight both the hard and soft outcomes experienced by clients (p.4). In terms of hard outcomes, significant changes involved entry into education and/or employment, increased qualification levels, change of job, promotion, and voluntary work. The softer outcomes were broader and included producing an action plan, clarifying next steps,

acquiring new skills, improved self confidence, openness to change, and awareness of learning/work opportunities.

The study identified the need for a more inclusive practitioner/manager approach in understanding “more about the complexity and challenges associated with measuring the impact of services....and the benefits of building the evidence-base for careers work” (Brett et al, 2008:12). The overall aim of the study is to develop improved datasets and to support professionals to learn new strategies for building evidence-based research for clients, policy-makers and themselves (p.12). One of the key outcomes of the study may be the future longitudinal tracking of a small sample of clients to provide more in-depth *participant-journey* case study material as a complement to the quantitative approach used in the six-month follow-ups of clients.

### **4.3 Measuring Progression in the Evaluation of Outcomes**

In order to better understand the complexities of measuring progression in longitudinal tracking, this section examines the concept of progression through definitions, types and barriers that impede it.

#### *4.3.1 Defining progression*

In linguistic terms the word ‘progression’ is defined as:

*progression: 1. the act of progressing, advancement; 2. the act or an instance of moving from one thing or unit in a sequence to the next*

(Collins English Dictionary, 1998:1235)

*progression: progressing, succession, series*

(Oxford Dictionary, 1995:461)

In relation to career development the concept of career has been constructed around “progression up an ordered hierarchy within an organization or profession” (Watts 1991, in Irving, 2005:14). Watts & Kidd (2000:494) redefine this “intrinsically elitist notion” arguing that career progression in a new post-industrial sense is “the individual’s lifelong

progression in learning and work”. Progression as a career process is a “learned sequence of career-development capacities and behaviours”, (Law, 1996:46). Law claims that the product of career progression is regarded as a range of activities that requires knowledge of changing causes and effects, gathering information, flexibility and resilience in contract negotiation and the ability to manage the resultant consequences of choices and behaviour (p.51). Progression in career and education is also a subjective construct based on the client’s own life experiences and expectations (Hearne, 2005:14).

In the context of education McGivney (2002:11) states:

Progression is one of the (many) words used in education literature and policy documents which has no universally accepted definition. At its simplest it connotes the idea of improvement in the sense of an advance from a less favourable to a more favourable state or situation.

(McGivney, 2002:11)

Moreover, the concept of progression is often combined with the idea of progress although the terms are not necessarily the same. Citing Turner (2001:7), McGivney argues that there needs to be a distinction “between progress (which is at the heart of all successful learning) and progression (which is an outcome of successful learning)” (p.12). McGivney argues that even though there may be an expectation by education providers that learners ‘progressively’ acquire skills, knowledge and understanding from a structured learning experience, progression can also mean personal and social development. Personal, social and economic progression can have life-changing effects on the individual (p.20). Personal progression can involve greater self-confidence, autonomy, self-esteem and change in attitude. Social progression includes improved social interaction, volunteering and community participation. Economic progression can involve skills acquisition, attaining employment and promotion (p.17). In relation to educational progression, McGivney finds that the “most frequently mentioned benefits or changes from learning were not instrumental gains but self-development, improved confidence and social contacts” (p.20).

In Irish education discourse progression is defined as the process by which learners may “transfer from one programme of education and training to another programme where each programme is of a higher level than the preceding programme” (NQAI, 2003:5; GOI Qualifications (Education and Training) Act, 1999:3). The NQAI expands on this definition stating that the concept of progression is “very much linked with that of access to learning” (p.6). It also configures individual progression in terms of occupational attainment as a direct result of educational programmes that “are intended to have an occupational outcome”. This type of definition prescribes progression as a vertical process that overlooks any other types of progression by learners in their education journey.

#### 4.3.2 *Types of progression*

In contrast, Watts (1999:2) argues that defining progression is challenging as it can take place *laterally* as well as *vertically* while retaining the sense of development, of moving forward. He contends that learning is the key to progression in work and it is the task of guidance to help individuals interweave the two on a lifelong basis. In Irish contexts, educational guidance is viewed as an intervention that promotes a change of attitude to learning thus prompting clients to “consider possible progression opportunities in education and training” (NGF, 2007a:37).

There is a concern that too much emphasis is placed on *linear* progression to give value and meaning to learning in adult and community education (McGivney, 2002:14). As a result, this may devalue the learning experiences of adults whose aims are not for higher achievements, employment outcomes or whose learning difficulties mean progression takes place in extremely small steps. McGivney states that this has given rise to the use of metaphors in education discourse that convey progression as movement in terms of ‘journey’, ‘pathway’, ‘mobility’, ‘routes’, ‘bridges’, ‘ladders’ (p.12).

However, “*vertical* progression remains a strong policy preoccupation despite its acknowledged inappropriateness for some groups of adult learners”, (McGivney,

2002:14). Conversely, adult learning and career pathways can be episodic and meander in several different directions over the lifespan reflecting a combination of ‘zig-zag’, linear and cyclical patterns, with no clear fixed idea at the outset of a pre-determined outcome (McGivney, 2002:15; Arthur et al, 1999:63). Furthermore, in evaluating the benefits of learning it is the ‘softer’ aspects of progression related to feelings and attitudes rather than the ‘harder’ aspects such as qualifications and jobs that are more frequently mentioned by learners (McGivney, 2002:21). This is in direct opposition to current UK education policy which values full qualifications and employment outcomes to measure individual progression (p.2). Similarly, in Irish education policy discourse learners’ progression is frequently referred to as progression from one course or programme to another in vertical, linear terms (NQAI, 2003:5). An exception to this is found in *Learning for Life: White Paper on Adult Education* (DES, 2000:141) which recognises “the non-linear nature of adult learning” in formal and non-formal education.

Nevertheless, the current policy requirement for measurable and analysable data on learner progression has an impact on the nature and supply of adult learning opportunities even though it is argued that measurement does not guarantee rigour or accuracy (McGivney, 2002:33). This does not mean that upward progression involving levels, accreditation and qualifications is not important as many individuals want formal recognition of their learning achievements.

Furthermore, McGivney (2002:33) states that the ‘process’ aspect of learning, and guidance, is a crucial element that is neglected in the drive for standardised and measurable parameters on outcomes. She argues that broader interpretations of concepts such as ‘achievement’ and ‘progression’ should be considered by policy-makers and funders. Resembling the arguments for measuring guidance outcomes in 4.2.1, McGivney states that these decision-makers also need “to accept qualitative as well as quantitative evidence of the varied outcomes for learners” in education contexts.

### *4.3.3 Obstacles to progression*

The possibility for flexible and progressive movement within the world of learning and work is more likely to lead to personal fulfilment (Watts, 1999:9). However, as accessing information, advice and guidance (IAG) is the starting point for any form of progression the dismantling of barriers is identified as a priority in guidance and education provision. In terms of accessing guidance, it has been found that the main barriers experienced by clients relate to knowing where to get help (access) and a lack of awareness of the benefits that can be gained from the intervention (take-up) (Taylor et al, 2005:115).

Barriers tend to be particularly high for disadvantaged groups and people with basic skills needs (Taylor et al, 2005:115). Taylor et al. identify a wide combination of barriers. They are transport problems, cultural and language barriers, inadequate provision outside normal office hours, family responsibilities, funding issues, lack of support from family and friends, low aspirations and lack of self-confidence. Bimrose et al (2008:5) have identified four serious barriers to career progression that prevent clients from implementing their guidance action plans. The barriers are:

- financial constraints;
- childcare commitments;
- health issues; and
- local labour market conditions.

Similar barriers have been identified in Irish adult educational guidance practice. Overall, the financial barrier is dominant, followed by family commitments, inappropriate timing, childcare issues and ineligibility to take up learning (Hearne, 2005:12). The NGF (2007a:37) states that the barriers that prevent adults within the AEGI target groups availing of educational opportunities include “lack of childcare, inadequate financial support, transport difficulties and physical access to premises”. In addition, the NGF states that adult literacy groups are poorly represented in the AEGI participation. This is a significant deficit considering the high level of literacy problems

in Ireland put forward by the National Adult Literacy Agency (NALA). NALA (2009:1) states that “one in four adults surveyed in Ireland did not show the literacy skills and confidence needed to take part effectively in society”.

Bimrose et al (2008:7) assert that overcoming some “types of barriers to career progression represents a major policy change”, which needs to be addressed in the guidance sector. In Irish educational policy discourse, the dismantling of structural blockages to educational progression is central to the support of adults in their educational pursuits (DES, 2000:32). It is recognised that within the Irish education system:

There are inherent inflexibilities within it, in terms of the predominance of full-time options, low participation of mature students in third-level, and difficulties with access and progression for those who hold qualifications other than the Leaving Certificate.

(DES, 2000:33)

Specifically, from a social inclusion perspective, there is a concern that the inequalities in educational opportunities and attainment arising from such barriers are preventing progression in a society where qualification inflation is on the increase.

Still, adults experience a range of personal and structural obstacles in their progression through further and higher education. Rogers (1996:68) claims that adult students bring different experiences and competing interests with them to education which can sometimes influence their progress in learning. For example, previous education, ‘realities’ of life (family, job, social life) and blocks to learning. For literacy students in further education, even though external, socio-environmental factors can contribute to the problem “one of the most pervasive barriers to successful literacy skills acquisition lies ultimately with the emotional self” (Kennedy, 2006:80). In the context of higher education, individual learning barriers centre on students’ attitudes to ‘real’ learning, their motivation and self-image (Knapper & Cropley, 2000:185). Negative attitudes to ‘institutionalized’ education may be influenced by earlier education experiences which have inculcated a fear of failure and an unfavourable self-image.

Mature students experience a number of social, educational and structural barriers that hinder their access, retention and progression and exacerbate such inequalities in the Irish higher education system (Lynch, 1999:187; Walters, 1997:21). The barriers include lack of necessary entry qualifications, information deficit, fears of failure and the unknown and time management. In particular, for women, childcare and the care of other dependents, conflict over time and access to transport are major issues (Lynch, 1999:206). As discussed already, the *financial* barrier is “regarded as the single most important obstacle to equality of participation in higher education by mature students” (p.203). Lynch contends that the lack of a secure income can have a profound effect on people’s self-image and their expectations of themselves and of education. She claims that “subjective aspirations are strongly conditioned by the objective (financially permissible) opportunities available (e.g. Bourdieu & Passeron, 1977)” (p.203). As a result, people lower their education sights, not because of lack of ability or motivation, but because they know that the higher education option is financially inaccessible to them. However, increased financial support in the short-term does not resolve the underlying causes of social and economic disadvantage as long as there are huge differentials in society (p.208).

At a structural level, the deficits in student tracking and evidence-based data across the education sector can impede an understanding of the nature of progression for adults (McGivney, 2002:29; Lynch, 1999:212). Parallels between the education and career guidance sectors are obvious. McGivney (2002:29) asserts:

The challenge for funding and quality assurance agencies, therefore, is to come to terms with the qualitative data and what is too often dismissed as ‘anecdotal’ evidence and to accept this in addition to quantitative evidence. The challenge for practitioners is how to present evidence of learning achievements in a way that is acceptable to policy and funding agencies.

(McGivney, 2002:29)

Lynch (1999:212) argues that a lack of tracking in third level can disadvantage mature students in particular, as there are difficulties about the recording and identifying of inequalities, and the implementation of supports needed for adult learners to enable their progression.

#### **4.4 Longitudinal Tracking in Adult Guidance**

Sultana (2004:99) states that firm evidence on the benefits of career guidance is still inadequate in the field. The use of longitudinal tracking studies to assess the impact of IAG which can be of immediate and long-term benefit to policy-makers and practitioners is well supported at this juncture in the discourse (Pollard et al, 2007:11; Maguire & Killeen, 2003:18, Hughes et al, 2002:20). It is now being argued that “the most definitive approach to estimating outcomes for individuals after using career development services is via a longitudinal study of users” (Access Economic Pty Ltd, 2006:12). Furthermore, in terms of methodology, qualitative longitudinal studies which focus on the ‘user’s voice’ have the capacity to provide insights already gained from quantitative data (Bimrose et al, 2008:2).

In the UK, longitudinal studies employing both quantitative and qualitative methodologies have become more prevalent in recent years. Such studies include Killeen & White’s (2000) evaluation of the net impacts of guidance on employed adults (*1,612n*) which used a control group in its research methodology to ascertain the economic outcomes of guidance intervention. Tyers & Sinclair’s (2005) longitudinal telephone survey of recipients of IAG (*4,361n*) involved the use of a control group of ‘information’ only clients. More recently, Pollard et al’s (2007) large scale telephone survey evaluated the net added value of adult guidance and advice between 2003 (*4,361n*) and 2006 (*1,300n*). In qualitative terms, a case study approach has been used by Bimrose et al. between 2003 (*50n*) and 2008 (*29n*) to provide rich, thick descriptions that enabled comparisons to be made across a variety of guidance contexts (Bimrose et al, 2008:viii).

In relation to Irish adult guidance provision, it has been recommended that quality client tracking systems are developed nationally to “ensure consistency of contact and monitor progression”, (Hearne, 2005:22). The formative evaluation of the AEGI in 2005 found disparities in the tracking activities of the twenty four projects investigated (SPSS Ireland Ltd, 2005:34). The evaluation found that a combination of methods was used by services including ‘client surveys’, ‘informal tracking’, ‘external evaluation’ and ‘no client

tracking'. So far the issue of a streamlined method of longitudinal tracking has not been adequately addressed in the AEGI, and there is still a lack of clarity on how it might be achieved from both a human resource and administrative perspective. This may have been addressed in the summative evaluation carried out by the AEGI in 2008, the results of which still have to enter the public domain.

The use of longitudinal tracking in guidance has both its limitations and detractors. Specific limitations relate to participant attrition rates over a period of time, changes of location for clients, and failure to remember the earlier guidance intervention and action plans made as part of the guidance process (Bimrose et al, 2008:24; Hearne, 2005:21; MM Consultancy, 2003:8). Attrition, which is common to longitudinal designs, is the tendency to lose certain groups of respondents over successive phases of a longitudinal research design (Pollard et al, 2007:6). As the loss is generally non-random, the representativeness of a sample can diminish over time, producing biased results. A further limitation of large scale telephone surveys is the costliness of telephone interviewing (Pollard et al, 2007:109). Furthermore, from a human resource perspective, client tracking requires appropriately skilled staff which may be costly and place specific burdens on individual guidance services (UDACE, 1986:93).

In a critique of client tracking, Douglas (2005:35) argues that the liberal model co-opts career guidance as a mechanism for surveillance and social control as “organisations dependent upon government funding face pressure to provide guidance for social compliance”. Douglas claims that governmental monitoring through client tracking will be used more and more as guidance organisations and practitioners “must adhere to external agendas and practitioners must meet targets to avoid personal censure” (p.35).

#### *4.4.1 Longitudinal designs*

Longitudinal research methods are essential for examining issues of causality and change in non-experimental survey research (Taris, 2000:vii). Longitudinal data in guidance presents information about what happened to a set of research units, as in the clients,

during a number of separate occasions in time. Taris explains that the data reflects behaviours and attitudes regarding the issues of interest at a series of time points (called 'phases' or 'waves' of the study) which can be anything from several weeks to more than several decades and the number of participants in the study are usually fairly large (p.1).

A number of issues should be considered before undertaking a longitudinal study (Taris, 2000:15/16). Primary focus needs to be given to the *objectives* of the study, which will inform the *basic design*, the *number of waves* and *spacing between these*, the *variables to be included*, and the *size of the sample*. Because non-response in any particular study is virtually always higher than initially expected, it is prudent to maximise the target sample size with the minimal amount of waves to garner answers to the research questions.

A 'time series analysis' may be appropriate for longitudinal designs in career guidance research (Taris, 2000:6). In this type of method repeated measurements are taken from the same set of participants allowing for assessment of intra-individual change over a particular time span. It is a general, flexible design which is usually reserved for a very limited number of subjects during a large number of occasions and for a small number of variables. Consistency of approach between survey waves in a time series study is crucial so that findings can be confidently linked to real changes in client experiences, rather than changes in methodology or in the nature of individuals surveyed (Pollard et al, 2007: 101). Pollard et al. advise that decisions taken at the beginning of the study are critical, for instance, the questions asked of clients in the study. If the background to the study changes significantly, there is little scope to adapt the research process accordingly. Whilst this could be viewed as a limitation of the methodology, it is simply the nature of longitudinal survey methods.

For instance, Taris & Feij (1999:160) state that when measuring career mobility the researcher must choose the mobility measure to be used contingent on the substantive research question in the theoretical framework. Mobility can be measured in a number of ways. The different ways highlight different aspects of mobility; some emphasise the

absolute amount of change (number of times it occurs for the individual); whereas others focus on the uncommonness of the transitions (relative to the careers of comparable others) that constitute the career trajectory. Moreover, approaches differ with regard to whether the valence (types) of transitions is to be considered or not.

#### *4.4.2 Measuring individual progression through longitudinal tracking*

As elucidated in this chapter and Chapter 3, there is a growing consensus amongst the guidance community that the issue of ‘time’ is critical in making judgements about a client’s educational and career progression. Even though short-term evaluation studies can provide an immediate impact, they need to be “extended to include client research and to enable longer-term analysis of key findings and trends” (Hughes et al, 2002:5). Longitudinal studies have the capacity to identify longer-term and more inherent effects of guidance intervention (Kidd, 2006:86; Maguire & Killeen, 2003:18).

Maguire & Killeen (2003:18) argue that ‘softer’ measures can be accommodated in longitudinal studies that are primarily quantitative in nature. In addition, rather than relying purely on hard data, evaluations of guidance need to take account of the impact of the intervention on the aspirations, motivation, attitudes and behaviours of clients (Maguire, 2004:190). Longitudinal evaluation studies can uncover shifts in attitude and perceptions of self over a period of time which may be affected by personal and structural obstacles. Furthermore, the softer outcomes such as the views and attitudes of clients are crucial to an understanding of the long-term impact of guidance, rather than relying solely on ‘hard’ data such as achievements in education and employment.

### **4.5 Summary of Literature**

This section provides an overall summary of Chapters 3 and 4. In terms of the focus of this research study, the literature review found that the topic of evaluating the long-term impact of guidance is still an evolving field. Even though outcome measurement has been discussed robustly since the early 1980’s, there is now a compelling drive in public policy to equate outcomes with the three OECD public policy goals of lifelong learning,

labour market and social equity. Within this context, it is now argued that legislation in practice needs to be underpinned by quality standards which can serve several goals related to quality assurance and quality improvement across the guidance sector. Therefore, the analysis of individual progression in Irish adult guidance practice forms part of a wider debate concerned with quality assurance and the evaluation of the long-term outcomes of guidance intervention.

The importance placed on quality issues in guidance is linked with a number of broader societal trends including new public management, value for money policies and professionalisation. It is proposed that quality in guidance is measured for a number of reasons which include political motivations, securing funding, measuring learner progression, service improvement, monitoring, strategic planning and practice/policy development. Even though it is recommended that national quality standards are the ideal from which guidance organisations can operate, the reality is that there are fundamental weaknesses across the European guidance sector.

From an Irish perspective, the OECD Country Review (2002) provided the impetus to address the issue of the development of quality standards in the Irish guidance sector. Despite the resultant proposals in the National Guidance Forum's *Integrated Framework for Lifelong Guidance in Ireland* (2007a), the implementation of quality standards for longitudinal tracking in the AEGI has still to be addressed coherently. The summative evaluation of the AEGI conducted in 2008 may attend to the issue in more depth, but this cannot be ascertained until the findings are disseminated within the public domain.

In more specific terms, the literature review found convergence and divergence in the discourse on outcome evaluation. This is a result of differences of opinion on issues related to definitions, types of outcomes, rationale, and methodologies. There is a general consensus that evidence-based research is crucial for evaluating effectiveness and longitudinal tracking is viewed as a suitable research method to achieve the measurement of outcomes in guidance. However, divergence occurs in relation to the rationale for

measuring outcomes and the ability to measure them adequately from the perspective of both the client and practitioner. In particular, there are concerns that if the underlying principle of evaluation is cost-benefit, rather than cost-effectiveness, the future of guidance will be dependent on achieving suitable economic outcomes to ensure funding. This may have a detrimental effect on practice and result in, if it has not already, the constant monitoring of hard targets prescribed at policy level. Although the funding of services is not a major issue in the AEGI at the moment, the consistent monitoring of outcomes will have implications for overstretched guidance projects in terms of human resources, costs and time.

Furthermore, agreement needs to be reached on specific performance indicators and benchmarks in practice that reflect the effectiveness of guidance. Owing to the very nature of guidance, identifying specific outcomes and implementing models for measuring them is proving difficult in the field. In terms of quality assurance, the most common model conceptualises guidance in terms of *input-process-output/outcome*. Of particular concern in the discourses is the focus of stakeholders, such as policy-makers, educators, employers, to measure progression into education and/or employment in terms of tangible, *hard* outcomes. Even though practitioners, theorists and researchers acknowledge that these are highly relevant outcomes, consideration also needs to be given to the broader range of intangible, *softer* outcomes that reflect the *distance travelled* or personal and social progression of the individual. It is now being argued that such outcomes can deepen understanding of the multi-faceted and subjective nature of progression, as well as illuminate the personal and structural barriers that hinder adults in their education and employment transitions over time.

With regard to the focus of guidance policy, the emphasis placed on the achievement of economic outcomes, is causing particular tensions amongst informants in the field. Whilst policy-makers are concerned with macro-economic issues of employment, labour productivity, marginalisation of certain groups, effective use of resources and social justice; practitioners are more concerned with micro-economic issues related to the

achievement of learning and employment goals by individual clients. Such arguments are underpinned by socio-political ideologies related to the liberal, conservative, radical and progressive approaches to guidance.

Finally, evaluating the efficacy of guidance is challenging, costly, time-consuming and may depend on the point of view of those evaluating it such as the policy-maker, service funder, practitioner and client. This gives rise to specific methodological challenges in the measurement of outcomes in evidence-based research in Irish adult guidance practice. Positivistic models, based on the theoretical paradigms which have influenced Irish guidance practice for years, may well provide reliable quantitative indicators. However, alternative methodologies, including interpretive or constructivist paradigms that reflect the client's subjective and contextual experiences and the range of outcomes achieved are now proposed in the field. Specifically, longitudinal studies that measure each type of effect allowing conclusions to be drawn about the progressive impact of interventions to support clients in their education and career progression have the capacity to inform both policy and practice.

In terms of the overall aim of this research, the democratic approach to outcome evaluation which has been proposed by Plant, H, (2005), Kelly (2004b), and Killeen (1996a) will underpin the argument put forward in the study. Specifically, it will address an identified gap in knowledge through its consideration of the client's contribution to the design of a quality longitudinal tracking system in Irish adult guidance practice. It will be argued that the design of a quality tracking system in the AEGI can be further advanced from the empirical data gathered from clients on a range of hard and soft outcomes constructs. This will involve the use of a bottom-up approach and an interpretive methodology to explicate the complexity and subjective nature of individual progression over time. This is in contrast to the presumptive process adopted by policy-makers in their quest for hard impact measures in the evaluation of guidance interventions.

#### **4.6 Conclusion**

This chapter has addressed the discourse on measuring progression as an outcome in longitudinal tracking systems in adult educational guidance. A critical analysis of the discourse has highlighted some of the conflictual standpoints adopted on the evaluation of outcomes in guidance at an international level. In the attempt to measure progression as part of a quality assurance process a number of important issues are evident. They relate specifically to definitions, types of outcomes, rationale, and methodologies. In addition, this chapter has also considered the newly emerging concept of the ‘voice of the user’ in the design of longitudinal tracking systems in adult educational guidance. Chapter 5 will put forward the methodology which will be used in the research design.

## **Chapter 5: Methodology**

### **5.0 Introduction**

This chapter deals specifically with the methodology which underpins the research design. The methods for data collection and analysis are discussed in detail in Chapter 6. Methodologies refer to the underlying approaches or philosophies adopted by researchers, whereas methods are essentially techniques for data collection and analysis (Tight, 2003:184). However, Tight argues that methodologies are more contested than methods. This is due to the philosophical stance and value position adopted by the researcher which informs the methods used to examine the research problem.

As the focus of the research is itself methodological, this chapter is weighted heavily in the area of methodological literature. The research design necessitated an examination of paradigms in guidance and the related fields of adult education, counselling and psychotherapy. In addition, the specific methodological issues of power relations, reflexivity and ethics for practitioner-researchers in adult guidance are addressed.

### **5.1 Identification of Research Questions**

Creswell (2005:8) states that the identification of a research problem consists of “specifying an issue to study, developing a justification for studying it, and suggesting the importance of the study for select audiences”. Prior to the establishment of an appropriate research methodology it is important to narrow the purpose of the study into specific questions to address the phenomenon under investigation (Merriam, 2001:60).

As discussed in Chapter 1, the overall aim of the research is to consider the development of a best practice framework for the longitudinal tracking of client progression in the field of adult educational guidance in Ireland. In exploring the research problem a number of research questions were identified.

### *5.1.1 Primary research question*

The primary research question asks “*How is client progression measured in the current longitudinal tracking system in the Irish Adult Educational Guidance Initiative (AEGI)?*”

In specific terms, this required an in-depth investigation of the concept of individual progression and current methods used to measure it in adult guidance provision. This will be addressed through a critical analysis of the process of meaning-making located in the discourses of three key stakeholders. Killeen (1996a:33) identifies a range of important stakeholders in guidance such as sponsors (funders, policy-makers), guidance managers and agencies, practitioners, and clients or consumers. For the purposes of this study the three stakeholders will be the client, guidance practitioner and policy-maker.

In addition, a number of secondary research questions have been identified. These will be used to examine the rationale and issues involved in the design of a quality longitudinal tracking system in adult guidance practice.

### *5.1.2 Secondary research questions*

1. How is ‘progression’ defined by clients, guidance practitioners and policy-makers in the field?
2. What are the experiences of adults who have received guidance intervention?
3. How is ‘progression’ measured in contemporary client data management systems in adult guidance contexts?
4. What are the key methodological issues involved in the measurement of individual progression in longitudinal tracking systems in adult guidance?
5. In terms of quality assurance, how can the guidance ‘user’, the client, contribute to the design of a longitudinal tracking system in the AEGI?

Careful consideration has been given to the philosophical position underpinning the design of a suitable methodological framework in the study. This requires an examination of the current ontological, epistemological and methodological issues involved in conducting guidance research.

## **5.2 Selection of an Appropriate Paradigm in the Research Study**

This research study adopts a critical constructivist position. It is informed by the findings of the earlier exploratory study (Hearne, 2005), which were discussed in Chapter 2. Nevertheless, to reiterate, the earlier study found that whilst there were merits in using a primarily quantitative approach to analyse the outcomes of educational guidance for a large cohort of adults, there were also some significant methodological limitations. Fundamentally, the analysis produced objective results that downplayed the subjective and contextual experiences of the clients' progression. It was determined that further elucidation through an interpretive approach was needed to capture the multi-faceted nature of outcomes in longitudinal tracking.

Overall, the research adopts a 'critical' stance in its constructivist analysis of the discourses of the three stakeholders on the topic of measuring progression. This approach is in line with contemporary thinking in career guidance where the core constructs which are the foundation of modern vocational psychology are now being re-examined and transformed (Savickas, 2000:59). As Reid (2006:30) asserts "many established theoretical models seem narrow, overly classified and at odds with the dynamic realities of real lives in a rapidly changing world".

It is now argued that the concept of secure and linear career paths can no longer be sustained, and the positivistic paradigm may be inadequate for client groups who constantly need to renegotiate their careers through difficult terrains (Bimrose, 2006:6). Furthermore, in seeking to measure change and progression in clients, it is vital to understand the complex variables that impact on this process that include gender, age, attainment, location, mobility and economic factors (Bimrose et al, 2004:11).

Alternative interpretive approaches, such as constructivist, narrative and biographical paradigms which bring to the fore the client's pre-occupations, context and subjective experience in the meaning-making process are now recommended (Reid, 2006:32). Emphasis is placed on the exploration of 'meanings' and perceptions of 'truth' from the

client's worldview. For instance, narrative approaches carry the "wisdom of lived experience" showing possible career paths through people's lives (Atkinson, 1998:76).

Critical interpretive approaches can challenge the dominant positivistic view of policy-makers in the evaluation of outcomes through a consideration of the position of the client and practitioner in the development of quality tracking systems in adult guidance practice. In support of the call for methodological pluralism in guidance research, I will argue that the findings from an interpretive study have the possibility to contribute to developments in the design of longitudinal tracking systems in adult guidance which are primarily quantitative in nature.

### *5.2.1 Positivist vs. interpretivist paradigms in guidance*

The preliminary findings of the 2005 REGSA study highlight some of the broader issues inherent in conducting empirical research in general, and the use of appropriate paradigms in guidance research. As already stated, many people have expressed concerns about the primacy given to, and the theoretical limitations of, positivistic methods in career guidance research and have suggested the use of interpretive paradigms (Bimrose et al, 2004:7; Herr et al, 2004:625; Chioussé & Werkin, 1999:65).

Herr et al (2004:625) assert that:

linear, quantitative, and hypothetico-deductive approaches fail to capture adequately the richness and complexity of the interaction of individual and contextual factors; human action, consciousness, and agency.

(Herr et al, 2004:625)

In contrast, interpretive approaches can dispute the traditional perspective that stresses predictability and generalisability, neglecting the complexities of career progression for individuals and the wide range of 'softer' outcomes achieved (Bimrose, 2006:6; Kidd, 2006:86). In particular, Patton & McMahon (2006:3) propose constructivism as an alternative to the mechanistic worldview found in the positivistic paradigm.

Nevertheless, methodological pluralism is now being advocated as all approaches are viewed as different ways of capturing and classifying human experience (Hughes & Gration, 2006:9; Herr et al, 2004:625; Chen, 2003:1). This is already recognised in counselling and psychotherapy research where the argument is based on the strengths and weaknesses of the different paradigms chosen by the researcher (McLeod, 2001:190).

### 5.2.2 *Definition of paradigms in guidance theory*

Essentially, the two broad philosophical approaches in research are positivist (quantitative) and interpretivist (qualitative). Within these approaches are a number of paradigms. A paradigm is a set of basic belief systems or interpretive framework representing the *worldview* of the holder. In career guidance, mechanistic paradigms (positivist) have underpinned career theories to a large extent (Patton & McMahon, 2006:3). However, more recently, a contextual worldview, which is reflected in the constructivist paradigm, has been advocated. Patton & McMahon claim that this worldview conceives development as an ongoing process between the individual and his/her environment where random or chance events contribute to an open state of being (p.3). This means that clients constantly engage with the changing contexts of their life situations in the construction of meaning in their career decision-making.

Guba & Lincoln (2008:192) claim that the issues most often in contention between positivist and interpretivist paradigms relate to inquiry aim, nature of knowledge, how knowledge is accumulated, quality criteria (rigour and validity) and ethics. All of these are encompassed in the ontology, epistemology, methodology and axiology (ethics) within a given paradigm (Denzin & Lincoln, 2008:245). Ontology is concerned with issues of existence and the nature of reality (realist or relativist). In interpretivist research a relativist ontology stresses the importance of viewing the meaning of experience and behaviour in context and in its full complexity (Robson, 2002:25). In contrast to realism, relativist approaches generate working hypotheses where concepts emerge from data rather than through prior imposition.

Epistemology deals with the origin, nature and limits of human knowledge (objectivist or subjectivist), and “implies an ethical-moral stance toward the world and the self of the researcher”, (Denzin & Lincoln, 2008:245). Methodology relates to the philosophical approach taken to determine the methods, systems and rules of inquiry (Guba & Lincoln, 1989:83). Methodologically, interpretivism is concerned with the interpretation of meaning and a hermeneutic understanding in a naturalistic setting in evaluation research (Greene, 1994:536). Patton (2002:114) states that “hermeneutics provides a theoretical framework for interpretive understanding, or meaning, with special attention to context and original purpose”. Hermeneutical approaches in career counselling “focus on bringing together the meaning or underlying coherence of an individual’s career”, (Patton & McMahon, 2006:6). Equally applicable to guidance is axiology (ethics) which stresses that “the researcher’s values, personal history and ‘position’ (i.e. gender, culture, class, age, and profession) are inescapable elements of the inquiry” (Havercamp, 2005:147).

### *5.2.3 Issues of power and polarisation in paradigms*

Denzin & Lincoln (2008:14) claim that polarisation between the positivist and interpretivist paradigms is embedded in the politics of research and the endeavour to legislate one version of ‘truth’ over another. This is found in counselling and psychotherapy where the medical model approach is deemed more credible and valid compared to naturalistic, qualitative and case study evidence in outcome research (McLeod, 2003:187). Likewise, the prominence of the positivist methodology to measure hard outcomes in guidance policy may be seen as an attractive option for “quick fix superficial facts, short-term solutions and simple remedies for complex and generalized social problems” (Cohen et al, 2007:47).

As any given paradigm represents the informed view of its proponents based on the way they have chosen to address the ontological, epistemological and methodological questions involved, a combination of constructivism and critical theory will be used in this study (Denzin & Lincoln, 2008:31). *Table 5.1* presents an overview of the basic

belief systems relevant to the philosophical argument put forward in the study which are addressed in this chapter.

*Table 5.1: Basic beliefs of alternative inquiry paradigms*

<b>Item</b>	<b>Positivism</b>	<b>Constructivism</b>	<b>Critical Theory et al</b>
Ontology	naïve realism – “real” reality but apprehendable	relativism – local and specific constructed and co-constructed realities	historical realism – virtual reality shaped by social, political, cultural, economic, ethnic, and gender values; crystallized over time
Epistemology	dualist/objectivist; findings true	transactional/subjectivist; created findings	transactional/subjectivist; value-mediated findings
Methodology	experimental/manipulative; verification of hypotheses; chiefly quantitative methods	hermeneutical/dialectical	dialogic/dialectical

*(Adapted from Guba & Lincoln, 2008:257)*

As no construction is incontrovertibly right, the construction in this study will rely on *persuasiveness* and *utility* rather than *proof* in arguing for the position adopted (Denzin & Lincoln, 1998:202).

#### 5.2.4 *Positivism: generalisability and objectivity*

Usher (1996:10) contends that the difference between research and the everyday problem-solving carried out by educational practitioners is found in the systematic nature of the former. However, he argues that in empirical research, data only assumes significance when used within descriptions, explanations or generalisations. In particular, *generalisability* is prized as it is seen as making application to other settings possible. Usher claims that the assumptions of the ‘discourse of science’, found in the positivist epistemology, emphasise *determinacy*, *rationality*, *generalisability*, *impersonality* and *unreflexivity* (p.13).

The positivist viewpoint has informed the traditional approach in career guidance providing a rational and objective model, along with scientifically reliable and valid

methods, for helping individuals choose occupations in a modern society (Savickas, 2000:59). Seale (1999:21) states that this model emphasises:

a commitment to value neutrality, a preference for measurement and quantification of observable events and a search for statistical regularities that can be understood as causal laws.

(Seale, 1999:21)

This scientific approach involves the construction of a hypothesis that can be tested through gathering data and measuring it in an empirical way to generate an 'objective' knowledge of social reality. The results may then be viewed as representative and valid of the researched phenomenon and can be applied generally (Seale, 1999:21).

In career guidance, the positivist paradigm can be found, for example, in the differential approaches and their application of value judgement methods to match individuals with suitable careers. However, Hammersley (1995:16) contends that the positivist approach to social research fails to consider how people make sense of the world by drawing on cultural resources instead of responding to external stimuli in a mechanical manner.

#### *5.2.5 Interpretivism: generalisability and subjectivity*

Criticism can be leveled at the positivist philosophy of science in its failure to account for the interaction between theory and fact and between observer and observed (Seale, 1999:23). In social research, Usher (1996:18) states that "knowledge is concerned not with generalization, prediction and control but with interpretation, meaning and illumination". Generalisability in interpretive or naturalistic research is problematic as human behaviour is "infinitely complex, irreducible, socially situated and unique", (Cohen et al, 2007:137).

In career development theory an 'interpretivist' reawakening has led to a reorientation of theoretical perspectives and a deeper interest in 'subjective' careers (Killeen 1996b:39). This has arisen from changes in organisations where there is no longer a guarantee of progressive careers. The subjective career relates to the "changing aspirations, satisfactions, self-conceptions and other attitudes of the person to his/her life work",

(Hall, 2002:10). The disregard for human subjectivity is central to a critique of positivism in career guidance theory. As subjectivity, or selfhood, is constitutive of culture and dynamically unstable, focus needs to be placed on the processes by which individual identity and social formations, that is, political and educational institutions and ideologies, create, promote or change each other (Tyson, 2006:284). A subjective approach in this research will reveal how interpretations are constructed and how clients reach mutual agreements on working definitions of reality in their career stories (Tovey & Share, 2003:18).

In addition, Richardson (2004:486) argues that career ‘scripts’ are constantly changing because of divorce, proliferating family forms, and revisions in the meaning of retirement. Bujold (2004:471) proposes a constructivist approach for conceptualising the narrative of career as career development is a creative process that involves multiple decisions, risk-taking, overcoming obstacles, chance, inner conflicts, unpredictable outcomes and dealing with the paradoxes of human behaviour.

#### *5.2.6 Characteristics of interpretive fieldwork*

As an exploratory study has already been conducted in REGSA, an interpretive approach in this study offers a powerful strategy to develop hypotheses and supplement quantitative data gathered from the same setting (Miles & Huberman, 1994:10). Furthermore, interpretive data will be valuable for its *local groundedness*, *richness* and use of *thick descriptions* to interpret the ‘lived’ experiences of the clients and practitioners in relation to the analysis of progression.

Patton (2002:53) states that interpretive inquiry recommends an active, involved role for the practitioner-researcher in the research setting. This is the central tenet of interpretive research and the opposite of the objectivist stance taken in positivist research. An interpretive approach to guidance evaluation requires the practitioner-researcher to ‘go into the field’ – into the real world of guidance organisations and people’s lives to capture the differences and particularities of individual situations (p.48). Going into the

field will allow for description and understanding of both external observable behaviours and internal states, which are the worldview, opinion, values and attitudes of the clients and guidance practitioners in the study. Fieldwork will also necessitate closeness to the people under study and the development of intimacy through a sense of shared experience, empathy and confidentiality. Therefore, Mason (2002:7) advises interpretive research “should be systematically and rigorously conducted....yet flexible and contextual”.

### 5.2.7 *Postmodernism and interpretive research*

Giddens (2001:696) defines postmodernism as:

the belief that society is no longer governed by history or progress. Postmodern society is highly pluralistic and diverse, with no ‘grand narrative’ guiding its development.

(Giddens, 2001:696)

From a sociological perspective post-modernity is best understood as a stance that involves “an acceptance of social and cultural difference, a readiness to revise interpretations and an openness to competing perspectives” (Tovey & Share, 2003:22).

Denzin (1989:52) argues that postmodernism “reflects a profound distrust of empirical-theoretical or purely theoretical, axiomatic, deductive schemes of thought”. The postmodernist ethical argument concerns the relationship between discourse and power found in ‘discursive practices’ (Butler, 2002:44). A discourse is viewed as a way in which meaning is constituted and given power within certain practices in the main intellectual disciplines, such as, law, medicine and education. These discourses not only accept some kind of dominating theory to guide them, which define and describe people, but they also express the political power of their users (p.44).

Butler (2002:16) states that postmodernism challenges these discursive practices through the process of deconstruction which depends on a relativistic view of the world. The relativist view stresses that truth itself is always relative to differing positions and

predisposing frameworks of the judging subject. Within this context, language is central to the sense-making process.

A postmodernist approach is helpful for viewing the contemporary educational phenomenon of ‘progression’ as indeterminate and open-ended in the measurement of long-term outcomes (Usher, 1996:25). However, Usher argues that:

if research is not to be either an instrument for the further dominance of technical-rationality or for the furtherance of human understanding and communication, then it has to involve *praxis* (informed, committed action).

(Usher, 1996:24)

In educational research, praxis means the practitioner is committed to “wise and prudent action in a practical, concrete, historical situation” (Carr & Kemmis, 1986:190).

Nonetheless, postmodernism is also challenged by both Beck and Giddens who argue we are now moving towards a new modernity with a globalised world order that involves ‘risk’ and ‘social reflexivity’. Beck’s (2001:398) theory of a ‘risk society’ contends that, in light of scientific and technological advances, old traditions are disappearing and the management of risk is now central to people’s lives. These risks require social reflexivity and reflection upon the circumstances in which people live their lives (Giddens, 2001:680). Both of these claims have relevance for career guidance counselling where clients will have to take more risks and reflect on how they live their lives in an increasingly knowledge-based society that involves continuous adaption to change.

#### *5.2.8 Postmodernism in guidance: constructivism and social constructionism*

A postmodern approach in guidance research can demonstrate how full explanations of the clients’ actions are replaced by accounts, or stories, about what they have done and why (Denzin & Lincoln, 2008:29). Postmodern and/or poststructural researchers view knowledge as a social construction and use such elements as verisimilitude, emotionality, personal responsibility, an ethic of caring, political praxis, multivoiced texts, and dialogues with subjects (p.12).

Richardson (2004:486) argues that postmodernism has impacted significantly on a revision of the positivist epistemology in vocational psychology. In particular, postmodernism has influenced constructivist and social constructionist approaches in helping to deconstruct the diverse meanings given to behaviour and action, and the unmasking of power hierarchies that are constructed and maintained through social and cultural processes (Reid, 2006:30; Richardson, 2004:486; Young & Collin, 2004:377).

Essentially, constructivism represents an epistemological perspective, concerned with how we know, and by implication how we develop meaning through cognitive processes (Young & Collin, 2004:375). In contrast, social constructionism:

asserts that knowledge is historically and culturally specific; that language constitutes rather than reflects reality, and is both a pre-condition for thought and a form of social action: that the focus of enquiry should be on interaction, processes, and social practices.

(Young & Collin, 2004:377)

The features of both theories pertinent to the construction of career allow critical awareness of the process of career in a number of contexts, that is, social, historical and cultural, through action and discourse in the forming of relationships and community (Young & Collin, 2004:378). Whilst both theories can provide an understanding of the issue of evaluation in adult guidance, this study will focus on the constructivist approach.

### **5.3 Rationale for an Over-Arching Critical Constructivist Paradigm**

The methodological framework of this study will adopt a critical constructivist paradigm. It assumes a relativist ontology (multiple realities), a transactional epistemology (co-creation of understandings) and a hermeneutic, dialectical methodology (Denzin & Lincoln, 2008:246; Alvesson & Skoldberg, 2000:144). Schwandt (1998:236) argues that in opposition to the realist view, constructivists emphasise the instrumental and practical function of theory construction and knowing, which is the product of complicated discursive practices.

In career counselling, as constructivism emphasises “self-organising and pro-active knowing”, its epistemology provides a perspective from which to conceptualise changing notions of career in a postmodern society (Patton & McMahon, 2006:6). In so doing, constructivism can challenge the basis of career development theories that maintain normative and predictable stages of development (Young & Collin, 2004:383).

### *5.3.1 Constructivism in guidance and education*

The orientation of the constructivist paradigm is the “production of reconstructed understandings of the social world”, (Denzin & Lincoln, 2005:184). The relevance of constructivism to education and career guidance lies in its emphasis on how people construct, deconstruct and reconstruct their own learning experiences. It is found in Mezirow’s (1991:4) constructivist transformation theory of adult learning which posits a developmental process of meaning schemes and meaning perspectives. This theory can also be applied to the transforming experiences of clients in their personal learning, education and career progression following guidance intervention.

In this study, the reconstruction of meaning will concentrate on the complexities of the clients’ subjective experiences of career progression (Schwandt, 1998:221). As constructivism means that knowledge is constructed or made, as opposed to discovered, it involves the invention of concepts, models and schemes to make sense of experience. These constructions are constantly tested and modified in light of new experience (p.237). This process of construction is found in career counselling where clients construct and reconstruct reality through language and dialogue with the counsellor to make sense of their career situations (Patton & McMahon, 2006:7). In narrative terms, the process of storytelling can help clients to discover deeper meaning in their lives through the process of reflection in oral expression (Atkinson, 1998:1)

Jordan et al (2008:96) offer three important categories of constructivism and their associated proponents in learning: trivial constructivism (Piaget, Bruner), social constructivism (Vygotsky, Bandura) and critical constructivism (Foucault, Freire). By

arguing for self-reflection, critical constructivism ('critical pedagogy') is particularly relevant to adult guidance in its challenge of the dominant power relations within the profession that serve to disempower individuals (p.104). In career guidance a critical constructivist approach is recommended as a vehicle to oppose the subjugation of the individual in the discursive practice of the science-practitioner (McIlveen & Patton, 2006:24). This study will show how critical constructivism can dispute the subjugation of the client in the discursive practice of policy-makers who favour the traditional positivist paradigm to measure outcomes in adult guidance. In its rejection of universal and generalisable truths, a constructivist approach will focus on the variability of how clients make interpretations of their experience (Brookfield, 2005:15). Currently, these variabilities in client progression are being screened out in the adult guidance management system (AGMS) used by the DES to regulate and monitor clients' progression.

### *5.3.2 Constructivism and discourse*

Young & Collin (2004:379) propose four dominant discourses where constructivism can challenge and provide opportunities in the career field. These are the dispositions discourse; the contextualizing discourse, the discourse of subjectivity and narrative, and the process discourse.

The dispositions discourse, based on a positivist epistemology, emphasises the notion of matching internal traits to occupational characteristics. In contrast, the contextualizing discourse locates individuals, their concerns, actions and career within their social, economic, cultural, historical, temporal and other contexts. The third discourse addresses how individuals construct self over time through narrative and life story forms. This discourse pays particular attention to self-definition, self and agency, purpose and subjectivity. Finally, in contrast to the previous three, the process discourse addresses how construction occurs and the process by which a career develops. The processes involve decision-making, cognitive and social processes and lifespan development, all of which inform counselling and other forms of intervention in practice.

### 5.3.3 *Criticality*

Criticality originates in the critical theory tradition in social science emanating from the Frankfurt School and its associated orientations and writers (Alvesson & Skoldberg, 2000:110). It is characterised by an interpretive approach combined with a pronounced interest in critically disputing actual social realities through an emancipatory interest in knowledge. Kincheloe & McLaren (2008:407) argue that, fundamentally, critical social theory is concerned with issues of power and justice and the ways that the economy, matters of race, class, and gender, ideologies, discourses, education, religion and other social institutions, and cultural dynamics interact to construct a social system.

In critical educational science, Carr & Kemmis (1986:192) state that:

the practitioner sets to examine where his or her own practice is distorted by 'taken-for-granted' assumptions, habits, custom, precedent, coercion or ideology.

(Carr & Kemmis, 1986:192)

Adopting a 'critical' methodological framework in education research allows the researcher to uncover power relationships and demonstrate the inequities embedded in society (Rogers, 2004:3). In terms of career guidance policy, practitioner-researchers can address such issues by critically examining the current discursive practices embedded in their profession in line with social justice concerns and the practice of 'real' democracy (Ozga, 2000:46).

Kincheloe & McLaren (2008:404) assert that a critical researcher attempts to use his or her work as a form of social or cultural criticism while accepting certain basic assumptions. Some of the basic assumptions that are relevant to adult guidance practice and this research are:

- 1) All thought is fundamentally mediated by power relations that are historically and culturally constituted.
- 2) It is impossible to isolate facts from values or remove them from some form of ideology.
- 3) Language is central to the formation of subjectivity (conscious and unconscious awareness).
- 4) Certain groups in any society and particular societies are privileged over others, and the oppression that characterizes contemporary society is most forcefully reproduced when subordinates accept their social status as natural, necessary or inevitable.

(Kincheloe & McLaren, 2008:405)

Kincheloe & McLaren (2008:404) state that rapid social and technological changes have called for the reassessment of questions related to self-direction and democratic egalitarianism in a globalised world. They put forward an interpretation of an ever-evolving criticality or reconceptualized critical theory that has been critiqued and overhauled by the ‘post-discourses’ of postmodern, critical feminism and poststructuralism in the last thirty years. Conversely, Hammersley (1995:x) questions the labeling of any sort of inquiry as “distinctively critical”. He argues that the lack of homogeneity and the conflicting conceptions of ‘critical theory’, found for example in poststructuralism and postmodernism, raises serious philosophical problems in social research. This lack of homogeneity may be seen as a limitation of using a critical approach in adult education and career guidance research.

#### *5.3.4 Criticality in psychology and adult education*

The issue of ‘criticality’ is already established in the related fields of psychology and adult education in its challenge of the values, assumptions, objectives and status quo inherent in these disciplines. In critiquing mainstream psychology, critical psychologists argue for an approach that focuses on social justice and human welfare (Prilleltensky & Fox, 1997:5).

The objection of critical psychology to some of the basic assumptions of mainstream psychology can be applied to evaluation practices in adult guidance. In its challenge to the prominence of individualism and objectivity in mainstream psychology, critical psychology emphasises how knowledge is influenced by varying historical arrangements, infused with political uses and embedded within the subjectivity of its creators (Prilleltensky & Fox, 1997:11). Furthermore, it proposes power should be shared equally, whereby legitimacy comes through a democratic process as opposed to the ‘expert’ stance of mainstream professionals. And, finally, professional ethics needs to include the ‘voice of clients’ and research participants in the shaping of ethical guidelines that directly affect their lives.

The link between education and democracy is found in Dewey's (1997:34) propositions of progressive education whereby "democratic social arrangements promote a better quality of human experience". Within the field of adult education, Brookfield (2005:11) argues that while criticality is a contested idea, it inevitably reflects the ideology and world view of the user. It involves a number of critical tasks that include identifying and challenging dominant ideology, unmasking power, contesting hegemony and practising democracy (Brookfield, 2005:2).

Pertinent to the critical approach of this study, ideology critique can help guidance practitioners become aware of how capitalism shapes social relations and imposes, through hegemonic practices, ideologies that justify and maintain economic and political inequity for their clients (Brookfield, 2005:12). For instance, ideology critique queries the legitimisation of capitalist ideology through changes in language that have seen the commodification of education, and adult guidance, whereby students and clients have been reconstructed as 'customers' and 'consumers' (p.12). In addition, ideology critique can help unmask the ideology behind the conservative, or dominant system that privileges some outcomes (hard) over others (soft) in evaluation to meet the needs of the labour market (Watts, 1996a:353).

### 5.3.5 *The 'critical turn' in adult guidance*

Essentially, to make the 'critical turn' in guidance means to acknowledge the interpretive and evaluative nature of all social theory and research findings (Richardson & Fowers, 1997:271). Critical research rejects naturalism, rationality, neutrality and individualism and argues for a dialectic between individual agency and structural determinism (Rogers, 2004:3).

McIlveen & Patton (2006:16) argue that vocational psychology and career counselling are powerful social institutions which influence individual lives, but are also influenced by broader global forces that impact on them. From a contextualist perspective, the broad range of variables affecting and interacting with the individual's career development

requires a recursive dynamic interacting system between client and practitioner (p.24). This challenges the traditional scientist-practitioner model with a move towards a critical-practitioner model where the counsellor should not be privileged over the client as the expert of truth.

The adoption of a 'critical' stance has begun to emerge in career guidance whereby practitioners need to be reflexively and critically aware of their own discursive practices (McIlveen & Patton, 2006:24). The concept of discourse refers to the ways in which meaning is organised, constituted and adopted by different subject positions within career guidance practice. Moreover, Stead & Bakker (2008:1) propose that postmodernist approaches such as discourse analysis may enable career practitioners to expose the value systems and power relations implied in professional, client and public policy discourses.

A critical approach in this study will challenge the dominant discursive practice of policy-makers who measure individual progression through reductionistic and deterministic methods. Habermas (1987:76) argues that a purposive-rational application of techniques validates how science makes possible technical control over processes of both nature and society. A critical approach will emphasise the limitations of the positivist paradigm in capturing the contradictions and inconsistencies of human behaviour. In particular, it will draw attention to one of the prevailing assumptions informing Irish adult guidance policy, that only education and employment (hard) outcomes enhance economic competitiveness. This assumption is reflected in the 'top-down' technocratic approach that values individualism, ignores the subjectivity and agency of clients, and assumes progression is linear and vertical despite the constraints that hamper individual progression. Furthermore, a critical stance can encourage guidance practitioners and researchers to reflect on the current power relations informing the evaluation of guidance outcomes in their profession.

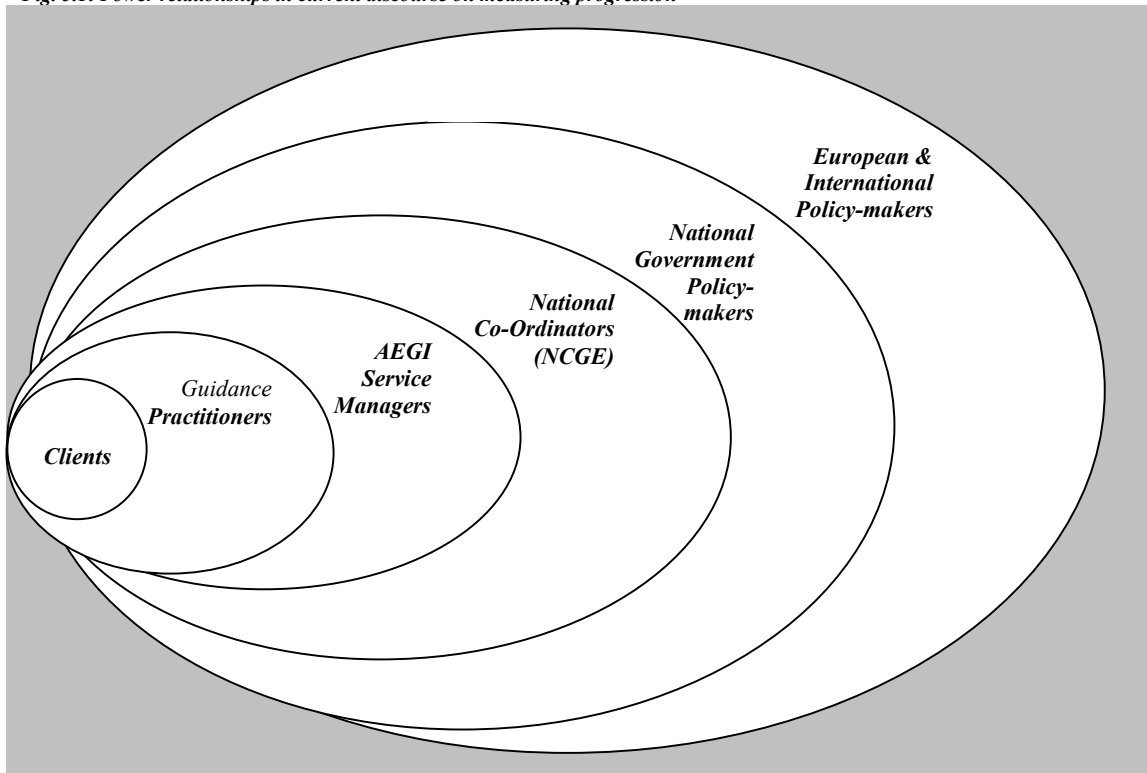
### 5.3.6 *Power relations in adult guidance*

Foucault's notion of power has influenced re-evaluations across the disciplines of career guidance, counselling and education. In career guidance and therapeutic practices there has been a shift from humanism and traditional psychological and counselling discourses towards narrative approaches (Reid, 2006:37; Besley, 2002:125; Parker, 2002:219). Reid (2006:37) states that Foucault's theories not only question the dominant assumptions of these discourses but also help to examine the macro concepts of power-knowledge to avoid myopic views of what is possible for the client. Furthermore, Usher & Edwards (2005:398) argue that the 'humanistic' discourse of educational guidance, where self-development and self-realisation become framed as a central normative, does not necessarily free individuals from the influence of power in modern society.

A critical position in adult guidance can lead to an understanding of the subtle and explicit ways our practice contributes to, or challenges, existing power structures within our profession. For example, Foucault's focus on everyday practices and behaviours of 'ordinary' people allows for an ascending analysis of power, as opposed to a top-down analysis inherent in current policy-making which is deterministic and conforming (Brookfield, 2005:127). As adult educational guidance is firmly positioned within Ireland's national lifelong learning policy, it has become embedded in political technologies and strategies of power (Nicoll & Fejes, 2008:5). The power relationships currently operating in adult guidance discourse in Ireland are displayed in *Figure 5.1*.

Central to Foucault's analysis is the view that power is relational, discursive and circulates in all directions at all societal levels (Tyson, 2006:284). As shown in *Figure 5.1*, the strategies of power in adult guidance practice are relational and found in the hierarchical approaches used in Irish guidance policy-making whereby guidance is influenced by European and international policy. Essentially, the measurement of outcomes is being determined by internal and external policy-makers far removed from the clients on the ground.

Fig. 5.1: Power relationships in current discourse on measuring progression



Power is exerted through interpersonal relationships or cultural practices and laws that demand conformity to dominant ideas (Jarvis, 2007:13). This is found in Foucault's concept of *governmentality* (bio-power). Foucault (1982:224) argues that:

Power relations have been progressively governmentalized, that is to say, elaborated, rationalized, and centralized in the form of, or under the auspices, of state institutions.

(Foucault, 1982:224)

Bio-power surfaces in the modern state as a coherent political technology to organise and manipulate people for increased productivity (Dreyfus & Rabinow, 1982:7). This practice is located in Foucault's argument that disciplinary power is exercised through systems of surveillance and social control (Foucault, 1980:155). In discourse analysis, disciplinary power can be viewed as *genres of governance* where any activity within an institution or organisation is directed at regulating or managing some other (network of) social practice (Fairclough, 2003:32). For example, it is now being argued in guidance discourse that career guidance can be viewed as a mechanism for surveillance and social

control. This is found in the increased use of client monitoring systems as a product of target-driven performance management in the sector (Brown, 2006:73; Douglas, 2005:35).

However, Foucault's overall objective has not been to analyse the phenomena of power, but to create a history of three different modes of objectification of the human subject: scientific classification, dividing practices and subjectification (Foucault, 1982:208). In so doing Foucault has been criticised for his lack of clarity on how discourse actually works through individuals and his underestimation of the importance of individual agency and responsibility (Butler, 2002:49). In career theory and counselling both of these elements are central to the belief that individuals are autonomous in making their career choices (Watson, 2006:50)

#### 5.3.7 *A critical methodology*

Alvesson & Skoldberg (2000:130) argue that whilst critical theory criticises positivism and empiricism it is limited in its lack of constructive methodological suggestions. They propose, depending on the position upheld by the researcher, a full or partial adoption of the theory is possible. The former would require a social science project guided by an emancipatory cognitive interest. The latter supports the intention to avoid the uncritical reproduction or reinforcement of dominant ideas and interests (p.131). Elements of the emancipatory approach may already be found in the *radical* ideological view in guidance that espouses an understanding of exploitative practices in group terms rather than individual terms (Watts, 1996a:354). Nevertheless, a partial adoption of critical theory will be used in this study. This will allow for a critical constructivist approach in the examination of the competing discourses on measuring individual progression through the process of *triple hermeneutics* (p.144).

*Simple hermeneutics* concerns the meanings the clients ascribe to their own subjective and intersubjective experiences of progression during the data collection stage (Alvesson & Skoldberg, 2000:144). In the data analysis stage *double hermeneutics* will be used to

develop knowledge from these experiences. *Triple hermeneutics* will involve encompassing these two elements and shifting the focus to a more critical-political dimension to allow for:

the critical interpretation of unconscious processes, ideologies, power relations, and other expressions of dominance that entail the privileging of certain interests over others, within the forms of understanding which appear to be spontaneously generated.

(Alvesson & Skoldberg, 2000:144)

The process of triple hermeneutics will be used to interpret the discourses of the primary and secondary data sources in the interpretative phase of the study (Chapter 9).

#### **5.4 Application of a Constructivist Evaluation Framework in Adult Guidance**

Deductive and inductive reasoning form the basis for evaluation practice thinking processes found in the two traditions of experimental-type and naturalistic inquiry (De Poy & Gilson, 2008:9). Hart (1998:82) explains deduction refers to “a statement or theory whose truth or falsity is known in advance of experience or observation (a priori: prior to experience)”. In contrast, induction refers to “a statement whose truth or falsity is made more probable by the accumulation of confirming evidence (a posteriori: based on experience)” (p.82).

In terms of evaluation methodologies, Guba & Lincoln (1989:58/62) contend that the conventional (positivism) paradigm is limited for a number of reasons. These reasons are:

- 1) It does not contemplate the need to identify stakeholders and to solicit claims, concerns, and issues from them.
- 2) It cannot solicit claims, concerns, and issues except by adopting a “discovery” rather than a “verification” posture, but only the latter is served by the positivist or postpositivist paradigm.
- 3) It does not take account of contextual factors, except by physically or statistically controlling them.
- 4) It does not provide a means for making evaluative assessments on a situation-by-situation basis (i.e. the generalizability issue)
- 5) Its (*sic*) claim to be value-free makes it a dubious instrument to use in an investigation intended to lead to a judgment about some entity (an evaluand).

(Guba & Lincoln, 1989:58/62)

In response to these limitations, Guba and Lincoln put forward a constructivist evaluation model which will be considered for application in adult guidance practice.

#### *5.4.1 Constructivist framework*

In career guidance evaluation, the limitations of using the conventional methodology to scientifically measure individual outcomes have been identified (Hearne, 2005:14; Herr et al, 2004:625). As an alternative, Guba & Lincoln's (1989:50) responsive constructivist approach proposes an integration of the viewpoints of all stakeholders and offers an alternative democratic framework for outcome evaluation in adult guidance.

In relation to evaluation, Guba & Lincoln (1989:68) claim that the disparities between the conventional and constructivist approaches lie in the problematic nature of human knowledge. Human knowledge consists of a series of human constructions which, precisely because they are indeterminate, unsettled and ambiguous cannot be scientifically measured. They propose that, as the conventional approach is linear and closed, constructivism is iterative, interactive, hermeneutic, intuitive and open (p.183). Therefore, they assert that a fourth generation evaluation framework needs to:

Provide a context and a hermeneutic methodology through which different constructions, and different claims, concerns, and issues, can be understood, critiqued, and taken into account.

(Guba & Lincoln, 1989:72)

*Table 5.2* provides a comparison of both approaches applicable to the development of an alternative constructivist framework for evaluation in adult guidance practice. From a democratic perspective, this framework proposes that all of the significant stakeholders in adult guidance should be involved in the formulation of the problem of outcome measurement in a way that is meaningful and relevant to all of those involved in the process. An application of this framework in adult guidance means the methodology has to be carried out within and across each stakeholder group, as in, clients, practitioners, national co-ordinators, education providers and policy-makers, and include constructions drawn from literature and from the experience of the evaluator (Guba & Lincoln,

1989:73). This allows for any construction, claim, concern, or issue to be introduced, properly critiqued and reconstructed.

*Table 5.2: Theorems applicable to evaluation*

<b>Item</b>	<b>Conventional (Positivist) Methodology</b>	<b>Constructivist Methodology</b>
(i) Nature of Evaluation	Form of scientific inquiry	Form of constructivist inquiry
(ii) Values and Evaluation	Evaluation produces data untainted by values. Values distort scientific data.	Evaluation produces reconstructions where 'facts' and 'values' are linked. Valuing provides basis for attributed meaning.
(iii) Accountability	Accountability can always be assigned as it is determinable by cause and effect. Maintenance of status quo.	Accountability characteristic of a conglomerate of mutual and simultaneous shapers which limits possibility of praise or blame
(iv) Objectivity of Evaluation Findings	Evaluators can position themselves to support the objective pursuit of evaluation activities	Evaluators are subjective partners with stakeholders in the literal creation of evaluation data
(v) Function of Evaluators	Evaluators function as communication channels through which data are passed to the relevant audiences of reports	Evaluators are negotiators aiming for consensus on better informed and more sophisticated constructions
(vi) Legitimacy of Evaluation Findings	Scientific evaluation data have special legitimacy and special status that confer on them priority over all other considerations	Constructivist evaluation data have neither special status nor legitimation; they represent simply another construction in move toward consensus

*(Source: Guba & Lincoln, 1989:109/110)*

The employment of a constructivist methodology in guidance evaluation requires adherence to a number of specifications (Guba & Lincoln, 1989:173/177). By adopting a relativist ontology, evaluation needs to be pursued in a natural setting where multiple realities are assumed. Evaluators enter the frame as learners at the outset, and with time begin to discern what is salient. Moreover, a constructivist methodology insists on incorporating *tacit* (implied) knowledge which represents the limits of the conventional paradigm in its pursuit of verification, testing of propositions and disregard for human subjectivity.

## 5.5 Criteria for Evaluating the Validity of Constructivist Research

A number of criticisms have been made by positivists of interpretive work in human inquiry. Schwandt (1998:246) contends that these criticisms centre on the problem of criteria and objectivity, the problem of inquirer authority and privilege (bias) and the lack of critical purchase. The lack of critical purchase is identified as one of descriptivism whereby “interpretive accounts lack any critical interest or ability to critique the very accounts they produce”, (p.247).

### 5.5.1 Credibility, transferability, dependability, and confirmability

Conventional researchers (positivists) question the credibility or trustworthiness of interpretive/naturalistic research because of its unscientific, exploratory and subjective nature (Denzin & Lincoln, 2008:10). Consequently, the terms of ‘reliability’ and ‘validity’ are replaced by the alternative terms of *credibility*, *transferability*, *dependability*, and *confirmability* in naturalistic inquiries (Denzin & Lincoln, 2008:33).

The four-point criterion for validity in this research study is displayed in *Table 5.3*.

*Table 5.3: Four-point criterion for naturalistic inquirers*

<i>Conventional inquiry</i>		<i>Naturalistic inquiry</i>
Truth value	(Internal validity)	Credibility
Applicability	(External validity)	Transferability
Consistency	(Reliability)	Dependability
Neutrality	(Objectivity)	Confirmability

*(Source: Lincoln & Guba, 1985:300)*

Lincoln & Guba (1985:294) assert that it is on the issue of trustworthiness that naturalistic investigations are open to attack from conventional investigators. The credibility of this interpretive study will depend on rigorous methods, the credibility of the researcher and the philosophical belief in the value of interpretive research (Patton, 2002:552). Credibility will be built up through prolonged engagement in the field, persistent observation and triangulation (Lincoln & Guba, 1985:301).

Lincoln & Guba (1985:297) propose that *generalisability* or *external validity* can be replaced by *transferability* through providing a detailed, rich description of the setting studied to allow for the applicability of findings to other settings. The findings from this study will have the capacity to be transferred to similar adult guidance settings and evaluation contexts.

*Dependability* and *confirmability* will involve the critical self-reflexive activity of ‘auditing’ whereby the research documentation of methods, data and decisions will be recorded throughout the research process (Lincoln & Guba, 1985:317).

In addition, consistent with a relativist view and the political implications of this research, the fifth criterion of *authenticity* will be achieved through the representation of a range of different realities (‘fairness’) (Seale, 1999:46). This criterion will involve triangulation to reduce *inappropriate certainty* by getting a ‘fix’ on a problem from two or more places (Robson, 2002:370). This is discussed in more detail in Chapter 6.

### 5.5.2 *Objectivity and subjectivity*

Patton (2002:51) states the contentious issue of objectivity and subjectivity in naturalistic investigations can be addressed through the adoption of a ‘neutral’ stance by researchers. All credible strategies should include techniques to help the investigator become aware of and deal with selective perception, personal biases and theoretical predispositions. Fieldwork in this study will involve closeness and familiarity with clients, practitioners and possible other relevant stakeholders which may dispute the integrity of the investigation. A balance between bias and detachment can be achieved through adopting the somewhat contradictory stance of “empathic neutrality” (p.51). As empathy and a nonjudgmental approach are important elements of career guidance counselling, a neutral empathic position will be relevant in this study. Patton (2002:53) states that empathy denotes a stance of caring, interest and intuitive understanding toward the research participants. Neutrality suggests a nonjudgmental approach towards their thoughts, emotions and behaviours which can facilitate rapport.

The value of empathy is emphasised in the phenomenological doctrine of *Verstehen* which supports much interpretive inquiry. *Verstehen* places emphasis on “the human capacity to know and understand others through empathic introspection and reflection based on direct observation of and interaction with people” (Patton, 2002:52). Furthermore, Schwandt (1998:226) argues that *Verstehen* particularly refers to the intersubjective character of the world and the complex process by which we recognise the meaningful actions of ourselves and others.

### 5.5.3 *Internal consistency and corroboration*

Finally, as the process of interpretation is itself highly subjective and there are no sets of formal procedures for ensuring narrative validity in interpretive research, *internal consistency* will also be considered. This refers to how the client “sees life events as related or connected in some way, because this is how one’s life is ultimately rendered meaningful”, (Atkinson, 1998:60). This is in contrast to an external criterion of truth or validity (p.61). In addition, subjective *corroboration* will be carried out through the process of member checking of the interview transcripts by the clients (p.61).

## 5.6 **Selection of a Suitable Research Methodology: Single-Case Study**

A bottom-up, user-centred and context-dependent approach is the foundation of the methodological framework of this study (Seale et al, 2004:8). Careful consideration has been given to the choice of a suitable research methodology to address the research questions within a constructivist paradigm. Two methodologies that are relevant to educational research, i.e. action research and ethnography, have been examined and deemed unsuitable as a continuation of the earlier exploratory study.

Firstly, action research is a cyclical process that involves planning a change, action and observation following the change, reflection on the processes and consequences, further planning and repetition of the action cycle (Robson, 2002:217). This methodology would be more suitable for ‘process’ research that would use a direct guidance intervention with the research subject/s, as opposed to the focus of this study which is the evaluation of

‘outcomes’ from an earlier non-research guidance intervention. Secondly, ethnography which has its roots in anthropology, involves an immersion in the particular culture or group in society being studied so that life in that community can be described in detail (p.186). This is also unsuitable as I do not intend to immerse myself in the day-to-day lives of a disparate group of clients.

Nonetheless, certain elements of action research and ethnography will be relevant to the study. From an action research perspective, the intention of this research is to inform praxis and promote change in adult educational guidance through the consideration of collaborative approaches in evaluation methodologies (Creswell, 2005:550; Carr & Kemmis, 1986:192). In addition, ethnographic studies involve time spent ‘in the field’ to investigate shared patterns of behaviour, beliefs, and language that develop over time through interpretive practices (Creswell, 2005:436).

A longitudinal case study design will be used to gain an in-depth understanding of the situation and meaning for those involved in the study (Merriam, 2001:19). From a constructivist perspective, Stake (2005:45) argues that case study research assists in the construction of knowledge through experiential and contextual accounts relying on subjective data in the empirical study of human activity. Longitudinal is defined as an investigation of the changes in a cohort group of clients over a period of time (Creswell, 2005: 356).

This case study will contain elements of an *intrinsic* and *instrumental* case study design (Cohen et al, 2007:256; Stake, 2005:460). First and foremost, the research has evolved because of my intrinsic interest in the meaning of long-term progression for clients following one-to-one guidance intervention. It is instrumental because it will serve to advance understanding by illuminating the particular issue of measuring client progression within the wider social and political contexts of evaluation in career guidance practice. Stake (2005:46) contends that case study can be a disciplined force in setting

public policy as vicarious experience is an important basis for refining action options and expectations in evaluation and educational policy-making.

#### *5.6.1 Case study as an evaluation methodology*

Case study is offered as an alternative methodology to quantitative approaches in education and career guidance evaluation research to explain the causal links in real-life interventions and illustrate certain topics in a descriptive mode (DePoy & Gilson, 2008:192; Rivis, 2007:4; Chioussé & Werquin, 1999:65). In evaluation terms, Patton (2002:55) proposes that case studies are valuable for capturing individual differences amongst participants and unique variations from one programme setting to another. Case study (or single-subject design) is appropriate when the goal is to measure changes in clients as part of our professional activity (McLeod, 2003:104).

#### *5.6.2 Definition of case study*

As definitions vary on what constitutes a *case study*, the design of this single-case study is informed by a number of theorists. Yin (2003:13) defines a case study as an empirical inquiry that “investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident”. An explanatory case study will be used here as the propositions of this study will adopt ‘how’ or ‘why’ questions, how and why progression is measured, and the focus is on the contemporary phenomenon of outcome evaluation in adult guidance (p.1).

Yin (2003:46) distinguishes between single-case designs and multiple-case designs. The use of a multiple-case design is informed by the replication logic (as in multiple experiments) and is often viewed as more compelling and robust. On the other hand, a single-case design can be representative, typical and revelatory in its uniqueness on a particular topic and context (p.41). In terms of replication, it will be important to show that the findings from this single-case study are not idiosyncratic but have relevance and applicability to other cases and contexts (McLeod, 2003:96).

Conversely, Stake (1995:1) argues somewhat differently stating that the ‘unique’ case is a specific, complex, functioning thing in its own right. A case study is defined by an interest in an individual case and the prime referent in a ‘singular’ case study is the case, not the methods by which the case operates (Stake, 2005:444). Case researchers seek out what is common and particular in the singular case study, for instance, the nature of the case; its historical background; its physical setting and other contexts (economic and political) (p.447).

However, Merriam (2001:27) contends that “the single most defining feature of case study research lies in delimiting the object of study”. In this context, the case is seen as a single entity within definite boundaries. This ‘bounded system’ can be an activity, event, process, or individuals (Creswell, 2005:439). Bounded means the case is “separated out for research in terms of time, place, or some physical boundaries”, (p. 439).

### 5.6.3 *Components and characteristics of case studies*

Yin (2003:21) recommends five components in case study design which will be addressed in this research study. These components are:

- 1) a study’s questions;
- 2) its propositions (‘how’ and ‘why’);
- 3) its unit(s) of analysis;
- 4) the logic linking the data to the propositions; and
- 5) the criteria for interpreting the findings.

Cohen et al (2007:85) state that the characteristics of a case study are: in-depth, detailed data from a wide data source; participant and non-participant observation; non-interventionist; empathic stance; holistic treatment of phenomena; and learning from the particular case. The advantages of using a case study approach in this research will be its strong focus on reality, the attention given to the subtlety and complexity of the case in its own right, and the results can be easily understood by a wide audience (p.256). As a method of interpretation, this single-case study will be characterised by its *particularity*

and *thick description* in addressing the research problem from a number of perspectives (Stake, 1995:41).

#### 5.6.4 *Defining the boundaries in the single-case design*

A strong argument is justified in the choice of single-case designs as they are vulnerable and open to “criticisms that reflect fears about the uniqueness or artifactual condition surrounding the case”, (Yin, 2003:54). In this single-case design, the objective will be to represent a typical AEGI project amongst similar AEGI projects in an investigation of the progression experiences of a cohort of clients embedded in the particular case site and context of REGSA. The longitudinal dimension will be examined through the three different time phases of 2005, 2006 and 2009 (Yin, 2003:42).

Yin (2003:28) argues that theory development is essential as part of the design phase whether the case study’s purpose is to develop or test theory. Merriam (2001:38) states that interpretive case studies “are used to develop conceptual categories or to illustrate, support, or challenge theoretical assumptions held prior to data gathering”. From a theoretical perspective this single-case study will show that the meaning of progression is multi-faceted and the inclusion of ‘soft’ outcomes to measure long-term progression needs to be considered in the design of longitudinal tracking systems in the AEGI (Merriam, 2001:30).

An explanation of the process of progression will be provided through individual client *vignettes* that will show the multiple realities and uniqueness of the client’s experiences (Yin, 2003:1). A vignette is “a focused description of a series of events taken to be representative, typical, or emblematic in the case you are doing” (Miles & Huberman, 1994:81). This will involve teasing out the stories of those ‘living the case’, the clients through a small number of research questions to provide *thick description* on the case’s own issues and contexts from the clients’ perspectives (Creswell, 2005:448; Stake, 1995:41).

### 5.6.5 *Issues of credibility, trustworthiness and generalisability*

Although case study is a distinctive form of empirical inquiry, it is argued as being limited by those who favour a scientific approach (Stake, 2005:447; Flyvbjerg, 2004:420; Yin, 2003:10). These misunderstandings relate to theory, reliability and validity, the very status of the case study as a scientific method (Flyvbjerg, 2004:421; Yin, 2003:10). Particular weaknesses of case studies are the lack of generalisability, and difficulties in cross-checking for subjectivity and bias despite reflexivity (Cohen et al, 2007:256; Merriam, 2001:42).

Yin (2003:10) contends:

The case study, like the experiment, does not represent a ‘sample’, and in doing a case study, [the] goal will be to expand and generalize theories (analytic generalization) and not to enumerate frequencies (statistical generalization).

(Yin, 2003:10)

However, Stake (2005:454) argues that the emphasis lies in the attention drawn to an understanding of the specific case through experiential descriptions and assertions, as in what can be learned from the particular case, as opposed to a generalisation beyond it. It gains credibility through triangulation of descriptions and interpretations (p.443).

Finally, as case studies can make theoretical statements, they must be supported by the evidence presented and the nature of generalisability has to be clarified in the case study (Cohen et al, 2007:254). Therefore, it is not the intention of this research that the findings from the illustrative case studies shall claim representativeness, rather the learning gained from them may be *typical* and *transferable* to other AEGI projects.

## **5.7 Reflexivity in Single-Case Study**

This single-case study will involve a critical reflexive approach. Reflexivity in adult guidance research recognises that researchers are unavoidably part of the social world that they are investigating (Cohen et al, 2007:171). A reflexive approach encourages awareness of the ways in which one’s selectivity, perception, background and inductive

processes and paradigms shape the research process (p.172). In interpretive research reflexivity is the most important characteristic of fieldwork and analysis in striving for reliability and validity (Delamont, 2004:226). In particular, Delamont states that “one vital stage where reflexivity needs to be exercised is the exit from the fieldsite, which is too often neglected”.

### *5.7.1 Reflexivity in education and guidance research*

The nature of reflective practice and reflexive practice in educational research needs consideration (Grenfell & James, 1998:123). Grenfell & James state that reflective practice relates to “the idea of continual learning supporting professional problem-solving, requiring reflection-in-action and reflection-on-action”, (p.123). This type of reflection is proposed by Schon (1991) in his examination of the nature of professional knowledge and the importance of contexts and professional judgment. Grenfell & James (1998:123) argue reflection in social scientific research, including education, is much more complex as the validity of knowledge and the means of attaining it are central.

Grenfell & James (1998:123) assert that there is a variety of meanings for reflexivity. Frequently, reflexivity is “presented as a criterion for judging the quality of research in times where the traditional touch-stone of objectivity has been abandoned”, (p.123). It is also viewed as a means for developing a critical position on previous research paradigms (positivism). Furthermore, reflexivity is a fundamental model in action research and practitioner research that can instil an examination of practitioners’ values and assumptions in their work (p.125).

This distinction between reflection and reflexivity in the therapeutic disciplines, such as guidance counselling, is taken up by Etherington (2004:28). Adult guidance counsellors also reflect upon their practice in their training and work. This allows us to create new meanings and gain better understanding of the guidance process. It is achieved through discussion in the form of supervision, note-taking and continuing professional development.

On reflexivity, Etherington states :

If we can be aware of how our own thoughts, feelings, culture, environment and social personal history inform us as we dialogue with participants, transcribe their conversations with us and write our representations of the work, then perhaps we can come close to the rigour that is required of good qualitative research.

(Etherington, 2004:31)

Etherington (2004:32) contends that interpretation of our research can be better understood and validated by others if they are informed of the position we adopted and our self-questioning of our involvement in the research study is evident.

In adult guidance research, the issues of ethical practice and reflexivity in research are synonymous. Professional reflexivity is the process of self-examination of the parameters of one's professional role and its implications for ethical practice (Havercamp, 2005:152). Havercamp argues that as helpers, we need to reflect on our position, as in, class, gender and status, our value commitments, our relationships with participants, our skills and knowledge base to develop an awareness of ethical issues and the choices we make.

As adult guidance counsellors, we are equipped with skills to draw out sensitive information from our clients/research participants. Reflexivity in our research encourages us to be cognisant of issues of power, influence, coercion, and exploitation when working with clients and peers (Havercamp, 2005:152). Similarly, Etherington (2001:9) stresses the need for researchers to be critically aware of the dual roles of practitioner-researcher. Nonetheless, she argues that qualitative research can also offer opportunities for clients to gain new understanding and insights as they recreate (or reconstruct) themselves in their storytelling. In addition, McLeod (2003:26) states that reflexivity can help the "researcher to keep track of how his or her own personal understandings are changed through engagement with actual informants".

### 5.7.2 *Critical reflexivity in adult guidance research*

Critical reflexivity in this single-case study will encourage an awareness of the issues involved in my journey as a practitioner-researcher in the research. These issues relate to my professional boundaries as a former Guidance Counsellor within REGSA, my engagement with clients of the service, and my position as a researcher in the professional field.

Mason (2002:7) states that critical self-scrutiny requires the researcher:

to constantly take stock of their actions and their role in the research process, and subject these to the same critical scrutiny as the rest of the data.

(Mason, 2002:7)

Interpretive researchers need to understand their role in the research process as they cannot be neutral, objective, or detached from the knowledge and evidence they are producing. Furthermore, the adoption of a critical position in adult guidance necessitates an examination of the values, assumptions and a critique of the status-quo of one's profession which should involve a critical self-questioning. It also means an acknowledgement of the subjective nature of our work. Nightingale & Neilands (1997:69) suggest some critical questions to ask oneself in applied research. These are:

- 1) What am I doing and why am I doing it?
- 2) What are my primary goals and values?
- 3) Are my activities consistent with these goals and values?

(Nightingale & Neilands, 1997:69)

With increasing pressure for quality assurance and accountability in adult guidance, practitioner-researchers may need to critically examine their own assumptions, values and biases when carrying out outcome research. As practitioner-researchers we need to ask ourselves questions such as:

- 1) *What are our own assumptions about the experiences of clients who have received guidance intervention?*
- 2) *What outcomes do we believe are important to clients?*

- 3) *Are some outcomes more important to measure than others?*
- 4) *Have we enabled or hindered the attainment of outcomes for clients?*
- 5) *How does attainment or non-attainment of outcomes reflect on our own practice?*
- 6) *Are some methodologies for measuring outcomes more valid than others in evaluation research?*

A further task for a reflexive practitioner-researcher is an examination of one's subject position in research. Tyson (2006:289) describes this as self-positioning whereby researchers are as "forthright as possible about their own psychological and ideological positions relative to the material they analyse". An assessment of my own subject position in this research can be explicated through the notion of the various 'hats' that I may inevitably have to wear during the research process. These hats are 'insider', 'outsider', 'guidance practitioner', 'investigator' and 'mature student'. The 'insider-outsider' position is a complex one. My personal history with REGSA implies that I have insider knowledge, but I must also assume an outsider position as I no longer work in the service or the AEGI. In addition, I may be an outsider in my profession as my research may inevitably challenge the assumptions, values and biases embedded within the discursive practices in the field.

## **5.8 Ethical Issues in Practitioner-Research**

Ethics are taken as a set of principles that guide conduct in a given situation and are generally informed by a code or set of principles (Robson, 2002:65). This single-case study design will be underpinned by an ethical framework that is regulated at three different levels (Cohen et al, 2007:71). At the legislative level it has met the requirements of WIT's Institutional Ethics Committee (February, 2006). At the professional level it is guided by the Institute of Guidance Counsellor's Code of Ethics (Irl.). At the personal level it will require a continuous reflexivity and keen discernment in my decision-making throughout the research process.

### 5.8.1 *Ethics and guidance research*

Methodological and ethical issues are inextricably interwoven in interpretive research in education (Cohen et al, 2007:69). This is particularly relevant to evaluation in guidance as practitioner-researchers may be open to claims of bias and bad faith (Killeen, 1996a:331). As a result, guidance research has to be transparent and needs to pay attention to the particular context, motivation for the research, methodology and method and recognition of any ethical considerations arising from the research (Marris, 2003:1).

The ethical issues that arise in research are the same as those that occur in the context of [guidance and] counselling practice (McLeod, 2003:168). In order to address such issues, guidance practitioners can deal with professional dilemmas by viewing ethics as an active process of decision-making involving discretionary and deliberative judgement throughout their practice (Swain, 2006:192). In addition, Havercamp (2005:146) states that professional reflexivity and the establishment of *trustworthiness* need to be at the core of interpretive research. Within this domain practitioner-researchers must address the specific issues of competence, multiple relationships, confidentiality and informed consent.

### 5.8.2 *Cost/Benefit ratio in practitioner-research*

As this single-case study will be a collaborative process it will require an ethical prudence to make it mutually beneficial to the participants and the research agenda (Atkinson, 1998:76) However, a major ethical dilemma can be the balance between the search for 'truth' and the protection of the participant's rights and values. This is known as the 'costs/benefits ratio' dilemma (Frankfort-Nachmias & Nachmias, 1992, in Cohen et al, 2007:52). The 'costs/benefits ratio' is defined as the balancing of likely social benefits accrued from the research against the personal costs to the individuals taking part. This requires guidance practitioner-researchers to make decisions about the research process in accordance with their personal values and professional ethics.

The ‘cost/benefit ratio’ will have specific implications for the engagement of clients and peers in this study. A particular ethical issue which has parallels with guidance counselling will be the protection of the clients’ privacy at all times. A distinctive ethical dilemma can arise in the situation of *dual relationships* where there is an imbalance of power between the counsellor-researcher and the client-participant (McLeod, 2003:174; Etherington, 2001:8). This is one of the most challenging requirements in practitioner-research as high levels of rapport, intimate disclosures, and potentially strong emotions can blur the boundaries between researcher and counsellor (Havercamp, 2005:153). Furthermore, interviewing or observing guidance practitioners will require equal consideration as it necessitates the establishment of good relations and a sense of rapport to build trust and confidence (Cohen et al, 2007:69).

### 5.8.3 *Ethical considerations in the single-case study*

Case researchers, like guidance counsellors, are guests in the ‘private spaces’ of the world and need to ensure the minimisation of risks to research participants (Stake, 2005:459). This study will need to consider a number of ethical principles. The four ethical principles proposed by the NCGE (2008:2) are “respect for the rights and dignity of the person, competence, responsibility and integrity”.

In addition, McLeod (2003:167) advises:

- 1) Beneficence (enhancing client well-being).
- 2) Non-maleficence (avoiding harm to clients).
- 3) Autonomy (respecting client’s right to self-responsibility).
- 4) Fidelity (treating all participants in a fair and just manner).

(McLeod, 2003:167)

Cohen et al (2007:58) contend that ethical principles are not absolute and need to be interpreted in the light of the research context and other values at stake. In February, 2006, prior to my review by the Institutional Ethics Committee, I examined a number of codes of conduct relevant to my research in the fields of education, career guidance and psychology. The professional bodies surveyed are: BERA (1992); IGC (2004); ICG

(2005); IAEVG (1995); PSI (2003); BPS (2006). In addition, since autumn 2008, I have been guided by the publication *Research Code of Ethics* (NCGE, 2008).

However, even though there is a certain degree of homogeneity between professional codes and guidelines they can only provide a guide and cannot tell the researcher what to do in unique situations (Cohen et al, 2007:73). Therefore, the research will also be guided by an ethical code framework suitable for this single-case study (Cohen et al, 2007:76). This framework is displayed in *Table 5.4*.

*Table 5.4: Ethical code framework*

<ol style="list-style-type: none"><li>1. It is important for the researcher to reveal fully his or her identity and background</li><li>2. The purpose and procedures of the research should be fully explained to the subjects at the outset</li><li>3. The research and its ethical consequences should be seen from the subjects' and the institution's point of view</li><li>4. Possible controversial findings need to be anticipated and, where they ensue, handled with great sensitivity</li><li>5. The research should be as objective as possible: this will require careful thought being given to the design, conduct and reporting of the research</li><li>6. Informed consent should be sought from all participants: all agreements reached at this stage should be honoured</li><li>7. Sometimes it is desirable to obtain informed consent in writing</li><li>8. Subjects should have the option to refuse to take part and know this, and the right to terminate their involvement at any time and know this also</li><li>9. Arrangements should be made during initial contacts to provide feedback for participants who request it: this may take the form of a written résumé of findings</li><li>10. The dignity, privacy and interests of the participants should be respected and protected at all time</li><li>11. Deceit should be used only when absolutely necessary</li><li>12. When ethical dilemmas arise, the researcher may need to consult other researchers or teachers</li></ol>
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*(Source: Reynolds, 1979, adapted by Cohen, Manion & Morrison, 2007:76)*

## **5.9 Conclusion**

This chapter has set out the philosophical position and methodology which will underpin the research design. In attending to the research questions the study will adopt an overarching critical constructivist paradigm and a single-case study methodology. Furthermore, the issues of power, reflexivity and ethics, specific to practitioner-research in adult guidance have also been considered. Chapter 6 will address the methods for data collection and analysis that will be employed in the research strategy.

## **Chapter 6: Methods**

### **6.0 Introduction**

This chapter deals with the methods of data collection and analysis in this single-case study design. Methods are the range of strategies used to gather data that form the “basis for inference and interpretation, for explanation and prediction” (Cohen et al, 2007:47). Grounded theory methods were used to gather primary data through individual face-to-face interviews, focus group interviews, unobtrusive observations and follow-up telephone interviews. Secondary data collection involved a range of key Irish policy documents.

The analytical strategy involved the use of a discourse analysis approach to analyse and interpret the data gathered from the individual interviews, focus groups interviews and policy documents. As the research study was underpinned by an ethical framework this chapter also addresses issues related to ethics and validity in the methods employed.

### **6.1 Case Study Design**

Robson (2002:89) argues that in using case study as a flexible research strategy the details of the design typically emerge during data collection and analysis. The early development of a case study protocol or plan to increase reliability and act as an aide-mémoire for the data collection procedures was an important task in the design of this single-case study (Yin, 2003:67; Robson, 2002:184).

There are several issues that needed to be considered in the planning of this case study which are highlighted by Cohen et al (2007:261):

- 1) The particular circumstances of the case, including negotiation of access to participants, and ownership and release of data.
- 2) The conduct of the study, i.e. the use of primary and secondary data sources, data collection methods, triangulation, data analysis, theory generation where appropriate, and case report writing.
- 3) The consequences of the research for participants in terms of anonymity and dissemination afterwards.

(Cohen et al, 2007:261)

6.1.1 *Embedded single-case study*

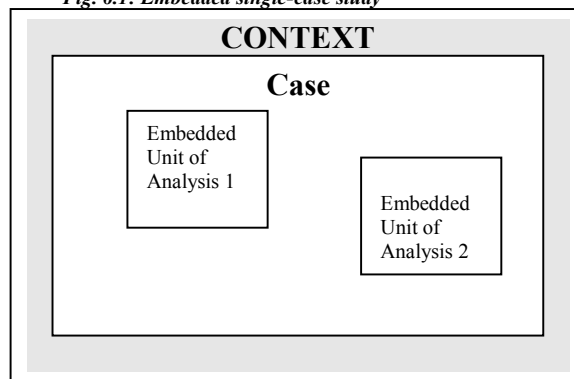
Even though this research was informed by the previous REGSA study, this study was treated as a separate, single entity in the form of a case study. The scope of this embedded single-case study proposed to investigate ‘how’ progression is measured by clients. The primary source of data collection was a number of interpretive interviews with a small sample of clients from the earlier REGSA study embedded in the context of the case site (Miles & Huberman, 1994:27). The specific boundaries of this single-case study are defined in *Table 6.1*

*Table 6.1: Boundaries of embedded single-case design*

<b>Case Type</b>	<i>An Embedded Single-Case Design</i>
<b>The ‘Case’ Study</b>	<i>A study of the long-term progression process for clients situated in an Irish Adult Educational Guidance Initiative project (AEGI)</i>
<b>Units of Analysis</b>	<i>Individual clients of an AEGI project</i>
<b>Case Site</b>	<i>Regional Educational Guidance Service for Adults (REGSA), Waterford</i>

As an *embedded single-case study* can involve multiple *units of analysis*, this study treated each client as a single *unit of analysis* in its consideration of the case as a whole entity, a client case (Yin, 2003:40). The concept of embeddedness is displayed in *Figure 6.1*

*Fig. 6.1: Embedded single-case study*



(Source: Yin, 2003:40)

Creswell (1998:63) states that in an embedded single-case design, data analysis is carried out by providing a detailed description of each case, the variations and themes within the case (*within-case analysis*) and a thematic analysis across the individual cases (*cross-case analysis*). The interpretative phase reports on the lessons learned from the case.

### *6.1.2 Units of analysis*

The key issue in sampling for the selection of appropriate units of analysis is determined by what is to be said about a topic at the end of the study (Patton, 2002:229). The primary focus in the data collection was on what is happening to the clients of REGSA and how has their education and career progression has been effected by guidance intervention (p.228). Therefore, emphasis was placed on the targeting of a specific aspect of the case, that is, clients only, and selection was made through sampling techniques from the client cohort of the previous exploratory study (Stake, 2005:451; Yin, 2003:43). The individual cases and variations across the cases focused the analysis.

Although the main focus of the primary data collection was the clients, data triangulation of multiple perspectives was also sought in the fieldwork. This helped to provide clarity and reduce the likelihood of misinterpretation on the case being presented (Stake, 2005:454; Yin, 2003:97). The sources of evidence for triangulation at different stages in the fieldwork were practitioner focus group interviews and unobtrusive observations of alternative adult guidance client data management systems. The triangulation process is discussed in 6.4.2.

## **6.2 Entering the field**

According to Patton (2002:310) fieldwork encompasses three stages: the entry stage, the data-gathering period and the closing stage.

### *6.2.1 Negotiating access and protection of participants*

In interpretive research, certain ethical issues have to be critically considered before entering the field of study. Stake (1995:57) asserts that most educational data gathering is almost always “done on somebody’s home ground” which “involves at least a small

invasion of privacy”. Entry into the field requires negotiating access with gatekeepers of an organisation and actual physical entry to collect data from potential research participants (Patton, 2002:310).

The particular ethical issues in this study were negotiating and securing access, protecting participants and assuring good faith to both the participants and gatekeepers involved (McNiff & Whitehead, 2006:86). As the organisation in question was my former employer (REGSA), permission was sought from the service co-ordinator (gatekeeper) to gain access to the clients (*n*50) from the 2005 study who agreed to follow-up contact in the event of further research. I also needed to negotiate access and provide certain ethical guarantees to the focus group participants and the gatekeepers of the observation sites.

For the purposes of engaging clients in interpretive research, McLeod (2003:169) argues that “informants who feel safe are more likely to share more of themselves”. He proposes three specific strategies in outcome research to safeguard informants (p.168).

The three strategies are:

- 1) Appropriate research design.
- 2) Informed consent.
- 3) Maintaining confidentiality.

Securing informed consent involved providing adequate information on the purpose of the research, the voluntariness of the client, and the nature of confidentiality (McLeod, 2003:170). In addition, because of the dual roles of practitioner-researcher, all reasonable steps were taken to ensure that consent was attained from all participants without undue pressure or coercion (NCGE, 2008:7).

The ethic of respect for client autonomy stresses the importance of collaboration and negotiation with the client in decisions about confidentiality (Kidd, 2006:131). One specific issue that needed careful consideration in the research was the unintended identification of clients because of my and their affiliation to REGSA (Havercamp,

2005:153). In particular, the matter of the case report and dissemination of the findings, which may not allow for sufficient anonymity, also needed to be addressed during the negotiation of confidentiality with the clients (McLeod, 2003:173).

### 6.2.2 Purposeful sampling

Upon securing access the next stage was the confidential selection of a sample of research participants. Cohen et al (2007:100) state that judgement has to be made on four key factors in sampling: the sample size; representativeness and parameters of the sample; access to the sample; and the sampling strategy. The criterion for choosing an appropriate sampling strategy was *fitness for purpose* in the single-case study (p.117).

A research 'sample' is defined as the people drawn from a total research population who actually participate in the study (McLeod, 2003:30). Following agreement from the gatekeeper in REGSA, a sample of clients was selected from the total research population drawn from the previous exploratory study.

McLeod (2003:31) argues that as the focus of case study research is on the intensive analysis of one or a few cases the issue of representativeness in sampling has a different meaning and may require a different form of sampling. Probability-based random sampling is one of the strategies used in quantitative research to provide a representativeness and unbiased sub-group from a population (Patton, 2002:230). Despite the use of random sampling methods in the 2005 REGSA study, it would have been unsuitable for this study as it would have required selection from the complete list of the original client population (Cohen et al, 2007:111). As many of these clients did not respond to the original study, or did not agree to further research, purposeful sampling was used on those clients from the study who agreed to be contacted for future research.

As purposeful sampling is more common to case study design a selection of *information-rich* cases were selected for an in-depth investigation of the issues of central importance

to the purpose of inquiry (Patton, 2002:230; Merriam, 2001:64). Three specific strategies were used for purposefully handpicking the participants from the research population. They were typical case sampling, criterion sampling and theoretical sampling (Patton, 2002:230).

Typical case sampling is illustrative, with the purpose being to describe what is typical of the case, the client, rather than making generalised statements about the experiences of all the participants (Patton, 2002:236). Criterion sampling can be used for quality assurance purposes to study cases that meet some predetermined criterion, for instance, clients meeting the 'hard' outcomes of education and employment attainment in guidance evaluation (p.238). Theoretical sampling, which has its source in grounded theory, is sampling on the basis of emerging concepts to permit elucidation and refinement of the variations and meanings of the concept of progression as it is found in the data gathered in the fieldwork (p.239).

However, "the principle of selection in purposive sampling is the researcher's judgement as to typicality or interest" (Robson, 2002:265). Ethically, this required careful consideration of an appropriate strategy to select a number of client cases from the previous study. Cohen et al (2007:115) view purposive sampling as deliberately selective and open to bias. On the other hand, Patton (2002:230) deems this 'bias' a strength as it becomes an intended focus that allows for an indepth perspective of the case study.

### **6.3 Fieldwork: Data Collection Procedures**

Merriam (2001:70) states that data collection techniques used in a study are "determined by the researcher's theoretical orientation, the problem and purpose of the study and the sample selected". The three sources of primary data collection in the fieldwork were individual interviews, focus group interviews and unobtrusive observations. The source of secondary data collection involved analysis of a range of Irish policy documents. As a grounded theory method can complement other approaches to interpretive data analysis it was only used for the data collection phase in the study (Charmaz, 2006:9).

### 6.3.1 Grounded theory

Grounded theory was used as a pragmatic method to systematically collect data on a phased basis in the field. Yin (2003:59) argues that even though data collection in case study does follow a formal plan, the specific relevant information may not be readily predictable and evidence needs to be reviewed during data collection.

Originating in the 1960's, grounded theory is an inductive process that allows for the generation of theory suited to its supposed uses as opposed to theory generated by logical deduction from *a priori* assumptions (Glaser & Strauss, 1967:3). Glaser & Strauss claim:

Generating a theory from data means that most hypotheses and concepts not only come from the data, but are systematically worked out in relation to the data during the course of the research.

(Glaser & Strauss, 1967:6)

In grounded theory, Charmaz (2006:130) states:

A constructivist approach places priority on the phenomena of study and sees both data and analysis as created from shared experiences and relationships with participants.

(Charmaz, 2006:130)

Constructing meaning involves the flexible gathering of rich-detailed data in the field to make a conceptual interpretation of actions in the setting (Charmaz, 2006:22).

The central task of using grounded theory in the study was the gathering of data through theoretical sampling from various locations in the field. This was an intentional and focused procedure that involved the simultaneous and sequential collection and preliminary analysis of the data during the fieldwork (Glaser & Strauss, 1967:45). Following iterative procedures the data was collected and added to until there was enough data to reach the point of 'theoretical saturation'. This allowed for a theoretical explanation of what was happening and what constituted the key features of the case study (Cohen et al, 2007:492).

As the study is already informed by my own background assumptions and disciplinary perspectives from the previous study and the literature review, the use of sensitising

concepts helped me pursue particular kinds of questions on the research topic (Charmaz, 2006:16). The sensitising concepts included theories related to the key areas of progression, obstacles, outcomes and longitudinal tracking. The concepts were used as points of departure to develop interview and observation questions and to think analytically about the data throughout the gathering process. The process allowed me to follow leads that were defined in the data from suitable location points. This was recorded in my 'memo' diary which was an integral part of data collection and analysis (p.72).

Certain criticisms have been made of grounded theory. Even though McLeod (2001:88) recognises the value of grounded theory in fieldwork, he questions the claims it makes to represent a rigorous and systematic approach to interpretive inquiry. He argues that there cannot be a 'correct' way to do grounded theory because of the schisms that have occurred since its original development. Goulding (2002:155) states this division has resulted in two distinct versions, and possibly most important, the misuse and abuse of its principles and procedures. There is also the possibility of 'premature closure', which is leaving the field too early before saturation has been reached (p.164)

However, in terms of case study research, Allan (2003:8) claims that even though there are certain tensions between Yin's (1994) version of case study and the grounded theory of Glaser & Strauss (1967), there are no real anomalies between the two. Whilst the former claims case study can benefit from the prior development of theoretical propositions, and the latter favour no pre-conceived ideas or hypothesis, the two approaches lead to building theories applicable to the real world at large. In addition, both methods collect data through interviews.

### *6.3.2 Individual interviews*

Individual face-to-face interviews with the clients were the primary source of data collection. Yin (2003:89) states that interviews are seen as one of the most essential sources of data in case study and should "appear as guided conversations rather than

structured queries”. Case study interviews are of an *open-ended nature* in their focus on facts and opinions (p.90). From a constructivist perspective, interviewing can be seen as involving the construction or reconstruction of knowledge rather than the excavation of it (Mason, 2002:63).

Choosing interpretive interviews can depend on the researcher’s ontological and epistemological position in relation to the research questions (Mason, 2002:63). Ontologically, the individual interviews highlight how the client’s experiences of progression are meaningful properties of social reality in outcome evaluation. Epistemologically, the generation of data through interviews facilitated a deeper meaning of the topic through an analysis of the client’s use of language and construction of discourse. Furthermore, the construction of social explanations and arguments in relation to measuring progression required “depth, nuance, complexity and roundedness in the data” which cannot be provided through broad surveys (Mason, 2002:65).

The clients’ stories provide a narrative truth by showing their individual progression paths up to the present time (McAdams, 1993:28). This storytelling process was a collaborative undertaking between me and the clients which required consideration of the skills involved. Mason (2002:75) emphasises that high levels of intellectual and social skills are necessary for conducting research interviews.

A number of comparisons can be made with guidance counselling skills (Mason, 2002:75; Ali & Graham, 1996:19). These skills involve:

- active listening
- reflecting
- paraphrasing
- probing
- achieving a balance between talking and listening
- observation of moods and verbal and non-verbal cues
- handling emotional boundaries.

Practical skills included the technical aspects of note-taking, tape-recording of the interview and transcription afterwards (Mason, 2002:75).

The three practical stages of interviewing are planning, interviewing, and transcription and interpretation (Atkinson, 1998:26). Semi-structured interviews were used in the study. Semi-structured means that even though there will be some pre-determined questions the wording can be changed and explanations given during the interviews (Robson, 2002:270). A number of broad, open-ended questions helped to draw out each client's interpretation of his or her experience, opinions and feelings on progression (Charmaz, 2006:25; Merriam, 2001:78).

However, as the interview process required intellectual preparation and quick decision-making the design of a loose interview framework was important (Mason, 2002:69). This involved designing a short list of issue-oriented interpretive questions on the topic at the outset (p.78). Following grounded theory procedures the first client interview involved initial data collection to inform the subsequent interviews. Thereafter, constant reviewing of data and developing of questions to address ideas and gaps was carried out for the rest of the interviews until saturation was reached (Merriam, 2001:163).

Conducting research interviews has an ethical dimension as they produce information about the human condition (Cohen et al, 2007:382). Mason (2002:79) states that questioning needs to pay attention to the position of trust and the power relations involved. Creating a setting or context that helps clients feel comfortable and safeguards confidentiality is important in the interview (Atkinson, 1998:30). As some of the participants were previous clients of mine, the skill of listening well meant suspending the former relationship, giving the teller respect and being as objective as possible (p.33).

However, a particular challenge of interviewing clients or former clients is the potential to re-stimulate painful experiences or unresolved conflicts (McLeod, 2003:77). This required keeping the interviews centred on the research task of obtaining meaningful data

from the clients without the interview turning into a guidance session. In the event of any upset or issues which may have arisen, it was my intention to debrief or appropriately refer on for further support (NCGE, 2008:13).

In terms of limitations, even though interviews can generate sensitive data they are “more liable to be influenced by the personality or interpersonal style of the interviewer” (McLeod, 2003:35). Furthermore, Robson (2002:273) states that the lack of standardisation is one of the main limitations of interviewing as it raises concerns about reliability. Interviews are also time-consuming as they require preparation, scheduling and are dependent on the vagaries of participant involvement. Finally, data limitations can include distorted responses due to personal bias, recall error, reactivity of the interviewee to the interviewer, and self-serving responses (Patton, 2002:306).

### *6.3.3 Follow-up telephone interviews*

During the closing stage of the fieldwork the sampled clients were followed up through short telephone interviews to track their progression again. As rapport had already been established the advantage of the telephone interviews was that they were quicker to administer (Cohen et al, 2007:380). The research protocol involved the design of a proforma questionnaire based on the findings from the individual interviews to gather further data in the field. The findings from the telephone interviews will form part of the overall discussion in Chapter 9.

### *6.3.4 Focus group interviews*

As the power of focus groups resides in their being focused on a specific topic a number two group interviews were conducted with guidance practitioners to gain an insight on the topic under investigation (Patton, 2002:388). These group interviews provided an environment where disclosures were nurtured and encouraged on the topic research (Krueger, 1994:15). Even though the interviews allowed the participants to hear each other's responses, they did not have to agree with each other or reach any kind of consensus (Patton, 2002:386).

Krueger (1994:20) states that the term *focus group* is frequently used to apply to any group discussion experience. He states they may contain some or most of six characteristics (p.16). In the context of this study the six characteristics were:

- (i) people
- (ii) assembled in a series of groups
- (iii) members possess certain characteristics
- (iv) they provide data
- (v) data is of a qualitative nature
- (vi) a focused discussion setting

Focus groups are typically made up of six to ten people with similar backgrounds (Patton, 2002:385). The topics are narrowly focused and the facilitation concentrates on keeping responses on target (p.388). Conversely, Morgan (1997:43) stresses that larger naturally occurring groups may be more difficult to manage but still have the capacity to be orderly. This depends on the purposes of the research and the constraints of the field situation.

The practitioner focus groups provided breadth and depth of information (Krueger, 1994:30). Morgan (1997:23) asserts that by conducting focus group interviews after individual interviews the researcher can explore issues that came up only during the analysis of the earlier interviews. This was helpful as the practitioners provided a different perspective on the topic.

The advantages of focus group interviews include the flexibility to probe and explore unanticipated issues, results are obtained quickly and they can increase the sample size of qualitative studies (Krueger, 1994:36). Nevertheless, the validity of this method is questioned due to the unpredictability of groups and the danger of moderators skillfully or unwittingly leading participants into decisions or consensus (p.32). Despite this, Krueger argues that focus groups have high *face validity* as “people open up in focus groups and share insights that may not be available from individual interviews,

questionnaires, or other data sources” (p.32). Face validity, or construct validity, refers to the reasonableness and credibility of the results obtained (Robson, 2002:102).

However, Patton (2002:387) contends that a limitation of the focus group method is that confidentiality cannot be guaranteed in focus groups. Therefore, appropriate measures were taken to protect the confidentiality of the guidance practitioners in the focus group interviews (NCGE, 2008:6). A number of additional limitations of the focus group method have also been identified by Krueger. These include a lack of control compared to individual interviews, data may be more difficult to analyse, and there can be logistical difficulties in creating a suitable environment conducive to conversation (Krueger, 1994:37).

#### 6.3.5 *Unobtrusive observations*

In order to ensure validity and deal with issues of bias, the fieldwork also included observation visits to adult guidance providers outside of the AEGI to observe their client data management systems. As the driving force behind the use of observation is the research question or questions, an understanding of how the process of longitudinal tracking is managed in similar contexts proved beneficial to the research (Robson, 2002:312). Ethically, it involved negotiating access with relevant gatekeepers in these organisations and the discussion of confidentiality issues related to the observation of sensitive client data.

The intention was to use these observation visits as a *supportive* or *supplementary* means to “collect data as a complement or set in perspective data obtained by other means” (Robson, 2002:312). Unobtrusive observation is non-participatory and non-reactive, and is more usually unstructured and informal (p.310). The choice of unstructured observation visits to guidance organisations involved going into the situation, observing what was taking place and deciding on what was significant for the research (Cohen et al, 2007:397). The findings from these visits will form part of the discussion in Chapter 9.

Two advantages of observation as a technique are its directness and its getting at ‘real life’ in the real world (Robson, 2002:310). However, in terms of limitations, Cohen et al (2007:410) stress that many observation situations carry risks of bias. This can be due to the selective attention of the observer, judgmental validity of evidence, selective data entry and selective memory.

#### *6.3.6 Documental analysis*

In addition to the primary data sources, a secondary data source involved analysis of a sample of key Irish policy documents informing current adult guidance practice. The policy documents provided valuable insights into the topic of progression from another angle. Merriam (2001:119) states that “secondary sources are reports of a phenomenon by those who have not directly experienced the phenomenon of interest”. However, this is also a limitation as the documents may be incomplete from a research perspective (p.124).

Content analysis was used to analyse the policy documents as it is a “systematic procedure for describing the content of communications” (p.123). It also helps to safeguard against personal bias through the application of rules in a consistent manner (Bryman & Bell, 2003:194). This analytical method is discussed in 6.5.5.

### **6.4 Issues of Validity in Single Case-Study**

Yin (2003:33) states that certain logical tests can be used to test the trustworthiness and credibility of a research design. The criterion for this constructivist single-case study has already been discussed in Chapter 5 (5.5). The practical strategies to ensure validity employed in the fieldwork are addressed here.

#### *6.4.1 Rigour in fieldwork: reactivity, respondent bias and researcher bias*

Three specific threats to validity are *reactivity*, *respondent bias* and *researcher bias* (Robson, 2002:174). Reactivity refers to the way in which the researcher’s presence may interfere with the research setting or the people involved.

Respondent bias can range from obstructiveness and withholding information, to the ‘good bunny’ syndrome where participants try to give the answers or impressions they think the practitioner-researcher wants.

Researcher bias refers to the views, assumptions and preconceptions which may affect the way the researcher behaves in the research (Robson, 2002:172). In this study, minimising practitioner-researcher bias necessitated a critical reflexive account of the impact of my position on the internal processes of the investigation.

The specific strategies for dealing with these three threats are displayed in *Table 6.2*. To ensure validity, all five strategies were adhered to in the research design. Prolonged involvement and triangulation are discussed in more detail in 6.4.2.

*Table 6.2: Strategies for dealing with threats to validity*

<b>Strategy</b>	<b>Threats to validity</b>		
	<b>Reactivity</b>	<b>Respondent Bias</b>	<b>Researcher Bias</b>
<i>Peer debriefing/ support</i>	no effect	no effect	reduces threat
<i>Member checking</i>	reduces threat	reduces threat	reduces threat
<i>Audit trail</i>	no effect	no effect	reduces threat
<i>Prolonged involvement</i>	reduces threat	reduces threat	increases threat
<i>Triangulation</i>	reduces threat	reduces threat	reduces threat

*(Source: Robson, 2002:174)*

Peer debriefing was a continuous process through my academic supervision. Member checking involved the reviewing by clients of their individual transcripts for clarity of understanding and meaning. An audit trail involved a full record of the research activities through a case study ‘memo’ diary, research diaries, client transcripts, and samples of the coding and data analysis techniques used in the study.

#### 6.4.2 Triangulation in single-case study

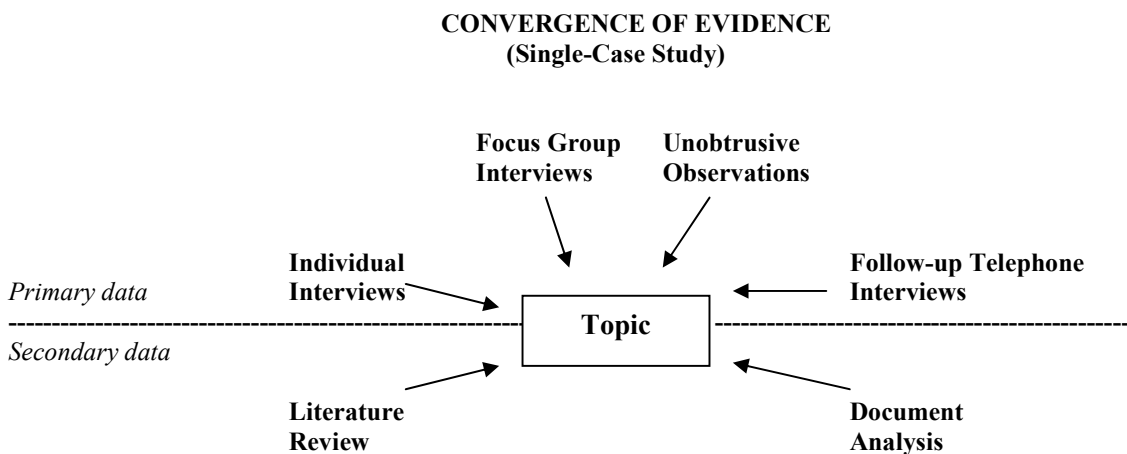
The purpose of triangulation is to converge on a single version of reality by gathering more than one perspective (Seale, 1999:53). As case researchers have an ethical obligation to minimise misunderstanding in their interpretations, triangulation was used to enhance the validity of the study (Stake, 1995:109).

Four basic types of triangulation protocols are distinguished by Denzin (1989:237). These are:

- 1) *data triangulation*: the use of a variety of different data sources (e.g. clients, practitioners, policy-makers).
- 2) *observer triangulation*: the use of more than one investigator in the research study.
- 3) *methodological triangulation*: the combining of two or more research strategies with the same empirical units
- 4) *theory triangulation*: the use of multiple theories or perspectives.

(Denzin, 1989:237/244)

As described in 6.3, this single-case study adhered to the first type (data triangulation) through the gathering of data from a number of different sources to address different but complementary questions within the study. The multiple methods are displayed in *Figure 6.2*.



(Fig. 6.2: Convergence of evidence model, developed from Yin, 2003:100)

However, triangulation is also critiqued as it can open up possibilities of discrepancies and disagreements among the different sources, such as interviews and documents, may be contradictory (Robson, 2002:175). Patton (2002:248) counters this viewpoint arguing:

A common misunderstanding about triangulation is that the point is to demonstrate that different data sources or inquiry approaches yield essentially the same result. But the point is really to test for such consistency.

(Patton, 2002:248)

Patton contends that different kinds of data may yield different types of results as different methods of inquiry are sensitive to different real-world nuances. This can provide an opportunity for illuminative findings across the different data. Therefore, finding inconsistencies should not be seen as weakening the credibility of results but offering prospects for deeper insight into the relationship between inquiry approach and the phenomenon under study.

## **6.5 Analytic Strategy in the Single-Case Study**

The analytic strategy in this single-case study addressed the theoretical propositions of the study and the development of a case description (Yin, 2003:109). Paltridge (2006:215) argues that a combination of perspectives is feasible if there is a clear rationale and understanding of the different approaches to be used. Therefore, even though grounded theory was used for data collection, it was not employed in the analytical phase. Instead, a discourse analytic framework critically analysed the discourses from the three data sources, the clients, practitioners and policy-makers, for a deeper understanding of the current discourse on measuring progression in adult guidance practice.

### *6.5.1 Discourse analysis*

Discourse analysis is a broad field with a number of disciplinary origins within the humanities and social sciences of sociology, psychology, philosophy and history (Wood & Kroger, 2000:18; Chouliaraki & Fairclough, 1999:1). In relation to career counselling, discourse analysis is an interpretative, critical process in which historical, contextual and

cultural aspects of socially shared constructions are studied (Stead & Bakker, 2008:6). The rationale for using discourse analysis in this study was, in suspending realism, the focus was on the constructive nature of accounts to show how the same phenomenon (progression) can be described, or created, in a number of different ways (Potter & Wetherell, 1987:35).

The term 'discourse' indicates the particular view of language as an element of social life closely interconnected with other elements of social life (Fairclough, 2003:3). Discourse is a unit of human action, interaction, communication and cognition, not just a unit of language; and is meaningful for a particular purpose at a particular time, for example, the evaluation of outcomes in adult guidance at the beginning of the twenty-first century (Edwards, 2008:22; Young & Collin, 2004:379). A discursive approach is viewed as an appropriate method to frame discursive practices in order to better understand issues of power, politics and ideology in public policy and adult guidance practice (Stead & Bakker, 2008:1; Tyson, 2006:285; McLeod, 2001:117).

#### *6.5.2 Foucauldian perspective in discourse analysis*

Discursive approaches are already found in the related disciplines of discursive psychology and education. Discursive psychology favours the interpretative repertoires of Potter & Wetherell (1987) that pay attention to the variability, construction and function of discourse at the individual level (Parker, 1997:288). In contrast, at a structural level, Rogers (2004:7) advocates critical discourse analysis (Fairclough, 1992, 1995) to describe, interpret and explain the discursive relations and social practices at the local, institutional, and societal domains of analysis in education.

Nonetheless, both approaches acknowledge that the function of discourse derives from the poststructural Foucauldian view that systems of knowledge are always more or less closely tied to the regimes of power that exist within a given society. Foucault rejects the standard philosophical project of discovering essential truths in favour of discovering cases in which what are presented as necessary truths about our condition are in fact only

contingent products of our historical situation (Gutting, 2003:864). A Foucauldian approach in this study sought to establish the relevance of the clients' historical pasts to their progression which may be overlooked in the current positivistic paradigm used to measure progression.

A range of discursive practices can be located in the field of adult guidance. They are found in one-to-one dialogue between practitioners and clients, practitioner talk, policy documents, professional development forums (conferences, symposiums) and academic literature. Edwards (1998:23) argues that discursive practices have to be mapped and located in discourses to be given meaning, which inevitably involves interpretation.

A Foucauldian discourse defines what can be included and prohibited as it locates people in certain 'subject positions' and provides a better understanding of abuses in power and ideological mystification (Edwards, 2008:22; Parker, 2002:131). In adult guidance, such positions are 'client', 'customer', 'consumer', 'user', 'practitioner' and 'policy-maker'. It is by the framing of persons through knowledge or expert discourses that the affective and effective governing of people is secured (Usher & Edwards, 2005:399). This exercise of power is presented as a neutral, 'scientific' process of scientific classification in client monitoring systems currently used in adult guidance practice.

As discursive practices render particular aspects of reality meaningful they are open to intervention and regulation through instruments or technologies such as documentation, computation and evaluation (Edwards, 2008:22). In adult guidance evaluation, power is secured through meaning as it legitimises some discursive practices (positivist) over others (interpretivist). In this study finding meaning on the discourse of measuring progression in client tracking systems raises a number of important questions.

These critical questions include:

1. *What is measured?*
2. *What is not measured?*

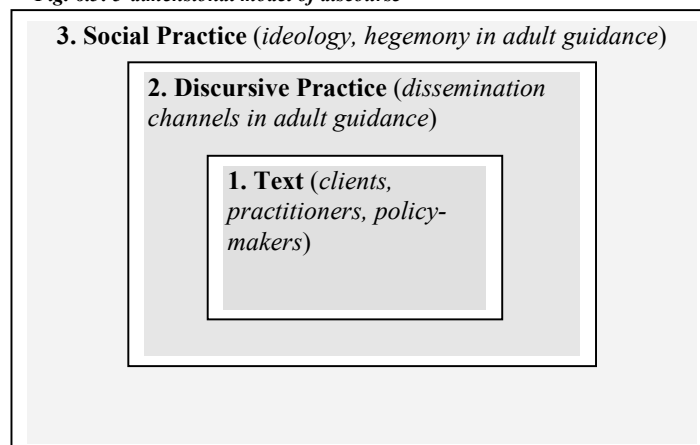
3. *Who is measuring?*
4. *What is the purpose of measurement?*
5. *How is measurement communicated?*
6. *What subjectivities are brought forth in client monitoring systems?*

In addressing these issues, the discourse analytical strategy focused on the mode of *scientific classification* used in hierarchical observation systems, such as client tracking, which decentre the subjectivities of clients and make them objects of knowledge (Foucault, 1982:208). Specifically, discourse analytical techniques attended to the dialectical relationship between language and elements of social life in the practice of the longitudinal measurement of progression in adult guidance (Fairclough, 2003:2). This was addressed through a critical analytical framework.

### 6.5.3 *Critical analytical framework*

An adaptation of Fairclough's (1992:73) three-dimensional conception of discourse was used as a critical analytical framework to describe, interpret and explain the current discursive relations and social practices in the evaluation of outcomes in adult guidance practice. The three levels are displayed in *Figure 6.3*.

*Fig. 6.3: 3-dimensional model of discourse*



*(Adapted from Fairclough, 1992:73)*

Fairclough (1992:73) explains that the procedure of textual analysis is called *description*, and the part which deals with the analysis of the discursive practices and social practices of which the discourse is a part is called *interpretation*. A combination of two analytical approaches was used in the research design. First of all, *textually oriented discourse analysis* techniques were employed at the level of the text of the clients, practitioners, policy-makers for the purposes of description. Later, at the interpretative stage, *critical discourse analysis (CDA)* was used for a synthesis of the findings from the textual data analysis of the primary and secondary data and the literature review to critically analyse the discursive and social practices in the field (Fairclough, 2003:2). The discursive practices relate to the various dissemination channels used in adult guidance such as expert groups, international policy centres, policy publications, conferences, and symposiums. The social practices relate to ideologies and hegemonic practices in current adult guidance policy and practice.

Fairclough (2003:2) states that the contrast between the two analytical approaches is that textually oriented approaches are concerned with the way various forms of language work; whereas critical discourse analysis (CDA) examines the ways in which these forms of language serve social, ideological and political interests. As some of the tenets of CDA can be found in critical theory, it offers a different approach or “perspective of theorizing, analysis, and application throughout the field of discourse studies” (Van Dijk, 2003:352).

In terms of textual analysis, a micro-analysis of the three data sources focused on language for a thematic analysis of their discourse. Textual analysis was carried out on the spoken interactions of the clients in the face-to-face interviews to explore the varied ways they make sense of (construct) their progression experiences. Content analysis was used on the focus group questionnaires and the Irish policy documents to examine how progression is represented in the discourses of the guidance practitioners and policy-makers. A synthesis of the findings from all three data sources at the level of the text completed the data analysis phase.

At the interpretative stage (Chapter 9), macro-analysis was carried out using CDA to locate and map the three discourses within the wider sphere of the discursive and social practices in the field (Rogers, 2004:7; McLeod, 2001:117). Rogers (2004:7) argues that:

This recursive movement between linguistic and social analysis is what makes CDA a systematic method, rather than a haphazard analysis of discourse and power.

(Rogers, 2004:7)

#### 6.5.4 *Interview textual analysis*

The textual analysis of the clients' narratives of 2006 concentrated on the construction of their subjective career experiences, for example, particular social and/or personal career identities (Edwards et al, 1998:4). Fairclough (2003: 26) refers to this as *styles* (ways of being). A social psychological approach was used in the analysis to examine both the extrinsic (social) and intrinsic (psychological) contextual factors effecting the progression process (Ullah, 1990 in Fairclough, 1995:205). This included giving attention to the concepts of structure and agency in the narratives to examine how structures and systems limit, shape and determine the events and actions of the clients. Agency foregrounds the ways in which situated agents (clients) produce events and actions in creative and innovative ways (Fairclough, 2003:224).

Textual analysis of the client interviews was two-fold; *within-case analysis* and *cross-case synthesis*. Specific discourse analytic techniques attended to a *within-case analysis* of the units of analysis (client cases) through pattern-matching and explanation building to describe and explain what is going on in the client data (Yin, 2003:109; Miles & Huberman, 1994:90). Pattern matching refers to the recognition of relationships between features of discourse within and across the five client cases (Wood & Kroger, 2000: 117).

As the textual analysis was more concerned with what the clients are doing or not doing, how they are doing it, and how it is connected to other things they are doing, analytic induction was used on the narratives to explain a cause-effect linkage (Wood & Kroger, 2000:137). Analytic induction started with a provisional hypothesis of progression from

a single case (Case 1), the hypothesis was then supported or revised, and the procedure was repeated through the series of subsequent cases (Miles & Huberman, 1994:147).

General patterns were extrapolated from segments of discourse in the transcripts to form sensitising conceptual categories. The development of sensitising concepts, which has already been addressed through grounded theory in the data collection, allowed for a focused interpretation of narrative content and an evolving hypothesis across the five cases (Wood & Kroger, 2000:99; Miles & Huberman, 1994:148). From these conceptual categories, pattern codes grouped segments of data into a smaller number of sets, themes or constructs for explanation building (Miles & Huberman, 1994:69).

Explanation building is a special type of pattern matching that requires analysis of the case data to refine a set of ideas (Yin, 2003:120). Yin states that as most explanation building has occurred in the narrative form, “the better case studies are the ones in which the explanations have reflected some theoretically significant propositions” (p.120). The explanation building process was also used for cross-case synthesis through a comparative analysis, in the form of a matrix, to develop and test a well-grounded set of explanations (Miles & Huberman, 1994:207).

A *cross-case synthesis* of the units of analysis enhanced generalisability, deepened understanding and developed more sophisticated descriptions of patterns and themes across the cases. This type of synthesis also helped find negative cases to strengthen theory through examination of similarities and differences (Miles & Huberman, 1994:173).

#### 6.5.5 *Content analysis*

Content analysis was used to code and analyse the larger amounts of data in the focus group questionnaires and the Irish policy documents for a thematic analysis. Content analysis involved the analysis, reduction and interrogation of texts into summary form through pre-existing categories and emergent themes in order to generate or test a theory

(Cohen et al, 2007:476). As content analysis is viewed as a quantitative strategy a transparent coding scheme allowed for objectivity and replication (Bryman & Bell, 2003:206; Harris, 2001:193).

However, content analysis is critiqued as it may not be possible to devise coding manuals that do not involve some coder interpretation and imposition of meaning (bias) (Cohen et al, 2007:490). Another limitation of this method is it cannot provide the sort of sensitive, penetrating analysis provided by discourse analysis (Wood & Kroger, 2000:33). As discourse can have multiple functions or meaning, discourse analysis is interested in semantic or representational content which does not involve coding into exclusive categories. However, Fairclough (1995:197) argues differently, stating that “form is a part of content, and that textual analysis is a part of content analysis”.

#### *6.5.6 Ethical considerations and discourse analysis*

A specific ethical concern in using discourse analysis to analyse data and interpret the findings was the issue of researcher bias which required careful consideration in the case study. Patton (2002:434) states that the uniqueness of every interpretive study requires a distinctive analytical approach that involves a duty to monitor and report the “analytical procedures and processes as fully and truthfully as possible”. In order to address this, McLeod (2003:86) proffers the phenomenological approach whereby the researcher must suspend or ‘bracket-off’ his or her assumptions about what is being studied and systematically try to find new or fresh ways of looking at the phenomenon.

#### *6.5.7 Limitations of discourse analysis*

In relation to the limitations of discourse analysis, Cohen et al (2007:391) state:

Discourse analysis has been criticized for its lack of systematicity, its emphasis on the linguistic construction of a social reality, and the impact of the analysis in shifting attention away from what is being analysed and towards the analysis itself.

(Cohen et al, 2007:391)

To address these limitations a systematic process was used in the textual and content analysis of the discourse of the three stakeholders. This is discussed in more detail in *Chapter 8*.

## **6.6 Conclusion**

This chapter has detailed the methods of data collection and analysis which will be used in this embedded single-case study. It has also considered the ethical issues involved and the strategies to ensure validity in the fieldwork. Chapter 7 will outline the fieldwork process which involves multiple data collection and opportunistic investigation to build on emergent possibilities, observations and learning over a period of time (Patton, 2002:318).

## Chapter 7: Data Collection

### 7.0 Introduction

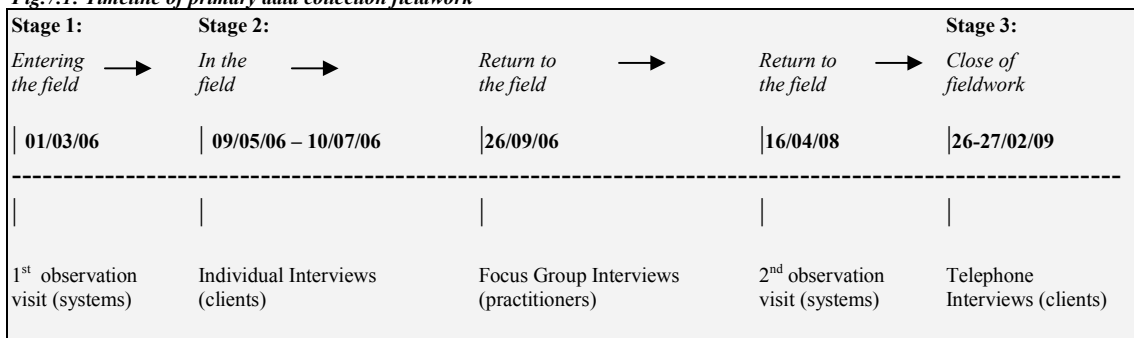
This chapter provides a reflexive account of the process of investigation undertaken during the fieldwork stage of the research. The chapter discusses the multiple methods used in both the primary and secondary data collection. The primary data collection involved individual interviews, focus group interviews, unobtrusive observations and follow-up telephone interviews. Secondary data collection involved a range of key Irish policy documents.

However, as the clients are the primary focus of this *single-case study*, the chapter concentrates heavily on the individual interviews to provide illustrative accounts of their experiences. The chapter attends to issues related to ethics and rigour as they arose over the course of the fieldwork.

### 7.1 Fieldwork

The focus of the data collection in this embedded single-case study was to examine the specific instance of client progression in order to illuminate the general problem of its longitudinal measurement in practice (Merriam, 2001:30). This required a multiple method approach. The time frame of the fieldwork of the primary data collection is displayed in *Figure 7.1*.

**Fig. 7.1: Timeline of primary data collection fieldwork**



Data collection and preliminary analysis were simultaneously carried out during the three stages of the fieldwork (Merriam, 2001:162). Entry into the field (Stage 1) began on 1<sup>st</sup> March, 2006 with the first observation visit, and closed on 27<sup>th</sup> February, 2009 (Stage 3) with the follow-up telephone interviews with clients. As Observation 1 (Stage 1) was carried out during the preliminary literature review, it is addressed in 7.1.4. Fieldwork (Stage 2) began in early May, 2006 following the selection of a number of clients for individual face-to-face interviews.

Prior to entering the field, an audit trail was instigated to enhance rigour in this study (Robson, 2002:174). Early in January, 2006, a research protocol that includes a single-case study plan was designed to record the step-by-step process involved in the access, selection and interviewing of the clients from REGSA (p.184). The Research Protocol is available in *Appendix C*.

In addition, an electronic reflexive ‘memo’ diary was created on the 6<sup>th</sup> April, 2006 to prompt preliminary analysis during the data collection phase (Charmaz, 2006:72). The memo diary is divided into three types of memos: memos on method, memos on data and reflective memos (Richards, 2005:74). This memo diary contains the contemporaneous notes showing the process of the research work as it evolved over time. Excerpts from the memo diary are available in *Appendix D*.

#### *7.1.1 Negotiating access and ethical selection of clients*

As I no longer worked for REGSA, I had to negotiate access with the service gatekeepers in order to select clients from the previous study. On 20<sup>th</sup> February, 2006 I was given permission by REGSA’s Manager to access the client data and database provided that I followed the Institute of Guidance Counsellor’s *Code of Ethics* (2004). Client confidentiality was to be guaranteed at all times. The identities of the selected clients for the interviews were not to be disclosed to anyone in REGSA. From that point onwards I liaised directly with REGSA’s Co-Ordinator.

Initially, REGSA's Co-Ordinator made contact by letter in early April, 2006 with the *total population* of fifty clients from the previous REGSA study (McLeod, 2003:30). This was to gauge their interest in participating in the current research study. By the end of April, 2006 responses indicated that only eighteen of the fifty original clients wished to be included in the selection process. I now had a smaller *target population* of participants to purposefully sample from (Creswell, 2005:145). Of the eighteen, twelve clients were from 2001 and six clients were from 2003.

Consideration was then given to the selection of four clients to begin with from the target population of eighteen. At the outset, I intended to select one client from each of the four AEGI target groups of literacy, VTOS, adult and community education, and others, as typical cases. However, as the target population was predominantly from the adult and community education group this was not feasible. Therefore, I handpicked clients I believed were typical of the client profile of REGSA during the two specific years of 2001 and 2003. In the final selection only one client had a VTOS background, the rest were from the adult and community education target group. Criterion sampling of 'education' and 'employment' attainment was based purely on information provided by the clients in the earlier questionnaire. Theoretical sampling was continuous during the fieldwork stage as concepts emerged and needed refinement (Patton, 2002:230).

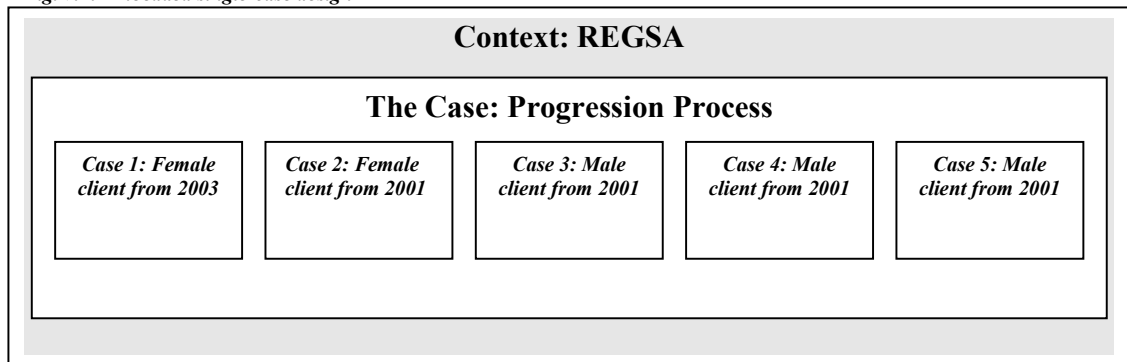
On 28<sup>th</sup> April, 2006 consent letters were sent out to the four clients and interviews were scheduled by telephone shortly afterwards. The fifth client was selected at a later date in the research. A copy of the consent letter is available in *Appendix E*. The consent letter was given to REGSA's Co-Ordinator to confirm the ethical procedures in the study. Prior to the start of each interview issues regarding the purpose of the research, the voluntariness of the client and the nature of confidentiality were discussed with each participant (McLeod, 2003:170). Two copies of the consent form were signed by the clients; one for the client and one for me. Three of the five clients asked not to be identified in the research study. Therefore, pseudonyms will be used for all of the clients to protect their anonymity.

### 7.1.2 Individual interviews

The focus of the individual interviews was to collect qualitative data from the sampled clients on their own subjective and intersubjective experiences of progression (Alvesson & Skoldberg, 2000:144). Five taped in-depth interviews were carried out with REGSA clients between the 9<sup>th</sup> May and 10<sup>th</sup> July, 2006. This is recorded on an interview schedule sheet, see *Appendix F*. The length of time of the individual interviews varied between one and one and a half hours.

I decided to select a small number of clients to illustrate the particular instance of individual progression over a longitudinal time frame. The five client cases (units of analysis) are displayed in *Figure 7.2*.

*Fig. 7.2: Embedded single-case design*



Three of the interviews were held in REGSA after office hours, one in Enniscorthy Enterprise Centre, Co. Wexford, and one in the client's place of employment. During the interview period two interviews were unable to proceed as the selected clients changed their minds at the last minute. The first of these clients made two different arrangements and still was unavailable for the third scheduled interview. The second client cancelled on the day and could not give me a definite date for her availability. Conscious of time constraints I decided to select two new clients for interviewing from the remaining target population. This decision-making process was recorded in my electronic 'memo' diary, see *Appendix D*. Any clients who were not selected for interview from the target group were written to at the end of August, 2006 to inform them of the situation.

Prior to the first interview, an interview framework was designed based on sensitising concepts yielded from the literature and previous REGSA study. See *Figure 7.3*.

*Fig. 7.3: Interview framework*

<b><u>Loose Structure Format of Individual Interviews</u></b>	
<i>off-tape</i> <b>Explain interview process:</b>	<i>Research interview vs. guidance interview Confidentiality issues and consent form</i>
<i>on-tape</i> <b>Introductory explanation:</b>	<i>“Can progression be effectively measured within longitudinal tracking systems in adult guidance provision?” Follow on from survey – where are clients now?</i>
<b>Identification of client’s progress to date:</b>	<i>Initial contact with service and help sought according to questionnaire</i>
<b>Their anticipated outcomes:</b>	<i>Have their expectations been met? What have their experiences been to date? What have they achieved? How do they feel about their progress?</i>
<b>Intrinsic and extrinsic factors:</b>	<i>Have there been barriers to their progression? How did they cope with them? What are they proud of? What have they learned and achieved?</i>
<b>Impact of guidance on their decision-making &amp; progression:</b>	<i>Have they benefited from guidance? Have they re-engaged with guidance since initial contact?</i>
<b>Purpose and content of survey:</b>	<i>Would they like their progress monitored longterm by surveys? What would they like to be asked in a survey? What do they think about giving feedback on service provision? Do they have something to contribute to designs?</i>
<b>DES criteria:</b>	<i>What do the clients think about progression in terms of education or employment only? Is there anything they would like the Dept to know about their progression?</i>
<i>off-tape</i> <b>Ending:</b>	<i>Do they want to be identified as part of the research? Address issue of member checking transcripts.</i>
<i>(Adapted from Mason, 2002:69)</i>	

This interview framework helped to develop the individual interview questions. Over the course of the five interviews I used theoretical sampling to develop a series of open-ended interpretive questions. The interview questions are available in *Appendix G*.

Shortly after each interview I sent a copy of the transcript to each client for member checking of the transcribed narrative (Robson, 2002:174). Some of the clients made corrections and reflective comments that contributed to the data collection.

A constructivist approach was adopted in the interviews to elicit the clients' meanings of terms, situations and events for a hermeneutic and interpretive understanding of their subjective experiences (Alvesson & Skoldberg, 2000:144). At times during the five interviews I had to "think on my feet" as there was a tendency to get sidetracked by the client's story and slip into the role of guidance counsellor (Mason, 2002:67). This appeared to happen more with former clients of mine compared to a client whom I met for the first time in the research interview (see entry for 9<sup>th</sup> May, in Memo Diary *Appendix D*).

Whilst the interviews are not complete life stories in themselves they can be viewed as the human stories of five clients' progression experiences after guidance intervention. At the time of the interviews each client had reached a different point in their progression towards a qualification and/or employment. Some were further along in the process than others. The five case vignettes provide an illustrative analysis of their personal actions, obstacles confronted and intentions realised and frustrated over a period of time (McAdams, 1993:30).

Miles & Huberman (1994:83) state that a vignette should have a specific structure to describe the key phenomenon under investigation. Each summarised case vignette addresses the following five areas:

1. Background information on client at time of first contact with REGSA;
2. Location of client at time of research interview;

3. Changes and benefits from guidance intervention;
4. The client's perception of his/her progression;
5. My reflections on the client's story and the research interview.

**(i) Joan (Case 1)**

The first client interview (Case 1) was held with a former client of mine on the 9th May, 2006 in REGSA. Joan was 31, Irish and a primary school teacher. She had two guidance sessions with me at the end of 2003, and a subsequent session in 2005 with another guidance counsellor in REGSA. In her first session with me in 2003 Joan claimed she needed a career change as she was stuck in a rut. As her unhappiness with her current job had been affecting her emotional and physical health, she was also receiving therapeutic counselling at the time. During the period 2003 to 2004, Joan spent time researching other careers. She eventually decided to apply for a full-time MA in Art Therapy in Cork that would allow her to use her teaching skills and pursue her passion for psychology and art.

In the 2005 survey I was surprised to hear that Joan's progress had been stalled because of problems with the start date of the MA. When I interviewed her in 2006 she was still on a career break and waiting to start the course. It had been suspended because of accreditation problems and was now due to start in October, 2006. This upheaval had forced her to rethink her plans. In the interim two years she 'ended up subbing' and doing learning support in a variety of schools. 'Subbing' refers to substitution teaching in other schools. The resultant uncertainty and financial insecurity had caused a lot of stress for Joan during this period. She described it as:

kinda been in no-man's land and in limbo-land, and not having any definite answer or date, like if they could have told me at the time, look it will start definitely in 2006, or, you know, also because I was subbing I was paid on a daily basis and I ended up, I suffer with kinda throat problems anyway, but I think the stress added to that I ended up been sick for a month, and then I wasn't paid and then as a result, it was a vicious circle, kind of, you know.

In spite of these challenging experiences, Joan was very positive and had learned to:

trust in that things will work out and I suppose, that things do work out and not that you have to kinda expect them to work out but, you know I did send CV's and I did ask around, and I did enquire, you know, so..

Joan had stated in the 2005 study that the main changes and benefits she had experienced from guidance intervention were: possibility of a career change; increased self-confidence; better motivation; more vision and hope for the future; and a feeling of being directed and supported. In the 2006 interview Joan said it had been a 'milestone to find out that the service existed' because she had not known where to go for help. Guidance was 'a positive experience' that helped her 'feel I've achieved something'. She had needed some direction and 'definitely wouldn't have applied for it [college] had I not come here [REGSA]'.

When I asked Joan about her progression she said that in 2003 'I hadn't made any progression because I had something else (psychology) in my head' and did not move on in that period. In 2003 she had 'needed a pointer, some direction' to help her because 'I liked the idea of psychology and couldn't see anything else'. Ironically, despite the challenges, she felt in a much better position to start her education journey in 2006. She stated that:

I think mentally, as well, I wasn't ready...now, I am much more, even this year now, I would feel I am more patient and, that my mind is in a better place, that I am in a better place to study even..

After the research interview was finished, I had time to reflect on the interview process and my client's story. I observed how Joan had changed since her first appointment with me in 2003 when she had been very low. She appeared calmer, happier, confident, and became animated when she spoke about her intended course of study. Even though Joan had still not started on her educational journey, it had taken her three years to feel psychologically ready to return to education.

During the transcription I reflected on my interview style and examined the emerging concepts in the data for the subsequent interview questions. Some of the questions were too long and needed further editing. There had also been a tendency to go off track at

several points in the interview where I felt myself slipping into guidance counsellor mode, for example, our discussion about funding and researching grants for her future studies.

Joan returned the transcript to me on 23<sup>rd</sup> May, 2006, with some minor changes in spelling and interpretation. She had included a number of additional comments that she felt was important to share with me and added to the data collection.

She had forgotten to say in the interview:

it is a fearful decision...making that change...and that change brings with it a rollercoaster of emotions, doubts and questioning; that it takes strength, patience and a whole lot of time and that there is a certain amount of upheaval and anxiety linked with the anticipation of the final result or the beginning of a new era.

She said that during a career change ‘support’ from people was important and ‘I needed people to believe in me to consolidate my own self-belief. I’m confident it will all be worth it’. The value of Joan checking her transcript was that it triggered further ideas as she had had time to reflect on her situation.

**(ii) Katherine (Case 2)**

The second client interview was due to be held on the 22<sup>nd</sup> May, 2006. However, this client pulled out of our meeting as she was also unavailable on two earlier occasions. An alternative client was selected and the second interview (Case 2) was held on the 1st June, 2006 in REGSA. In 2001, Katherine had received guidance from a colleague in the service. She was 59, an American/Irish citizen who had completed her secondary education in the USA. She was only recently separated, had three children, with one still in secondary school. Although Katherine did not have any formal Irish qualifications, she had a desire to get a third level qualification.

In the 2006 interview Katherine stated that by 2001 she ‘had a lot of free time’ and decided ‘it is time for me now to see can I do this’. She only had one appointment when she received help with a CAO application to enter full-time third level education that

autumn. Katherine felt she was signposted in a direction she had not considered before and this gave her the focus to pursue a BA in Accountancy.

She began the full-time accountancy degree in September, 2001. However, as Katherine had been out of full-time education for a significant period (35 years), she found the whole experience extremely challenging. The workload was difficult and she had consistent learning blocks. She did not pass the first year. Despite taking one-to-one tuition for mathematics and repeating the exam the following year (2002-2003), she did not pass the subject and could not progress to second year. Katherine then changed to a closely related part-time evening course which was more flexible. In 2005, without completing the Higher Certificate in Business Studies she took time out again because of family commitments.

Katherine had stated in the 2005 study that the changes and benefits she had experienced from guidance intervention were: returned to learning after a number of years; started suitable education/training course; feel more self-confident; and now working towards a goal that is achievable. In the 2006 interview she said that she had found the guidance she received very helpful and 'the length of time spent with me' valuable. She was signposted in a direction she had not considered before and this gave her a specific focus.

Katherine was unhappy that her progression was taking so long in 2006. She stated:

Well, I haven't got any qualifications, am, which I am actually a bit disappointed in myself for not having accomplished. I mean, had I been able to do all the courses, all the subjects when I was doing the full-time course I would have finished, you know a couple of years ago so, disappointed in that. I thoroughly enjoyed all of my experiences, am, either nighttime, daytime and even the distance one. I found the subjects all interesting and I feel I certainly learned something, in all of them.

She had no set purpose in entering third level education apart from the fact that she had waited thirty or so years to do so. Raising her family had been her main concern, and these family priorities continued to impact on her education pursuits. It was Katherine's intention to return to the part-time programme in September, 2006 with the goal of progressing to the full-time degree at some point in the future.

In terms of an understanding of client progression, this interview provided me with a deeper appreciation of the motivations of older learners. Katherine felt, compared to the USA, her age group (over 55) was being short-changed by the Irish education system. She believed that this particular cohort were 'possibly not even aware of the fact that they are being excluded'. In her view, third level education needs to be more inclusive and conscious of the needs and interests of adult learners, and not just qualification orientated.

I had found this interview different to the first interview. As Katherine was not a client of mine I remained more focused and detached. The interview was transcribed immediately and I made some changes to the questions for the next interview. The transcript was returned by the client on 19<sup>th</sup> June, 2006 with additional information that she had forgotten in the research interview. In the same year that Katherine had studied two accountancy subjects part-time she had also completed a part-time Interior Design course and been awarded a Diploma. She stated that she had:

completely forgotten I had done that course and was not sure whether it was relevant but it does mean I am a qualified Interior Designer.

Despite her disappointment in not yet completing her accountancy degree, Katherine had gained a qualification and was in a position 'to start her own business or work for others'. Once again the value of the client checking the transcript was evident as it allowed for further reflection outside of the research interview and provided additional data.

***(iii) James (Case 3)***

I interviewed the third client (Case 3) on the 7<sup>th</sup> June, 2006 in REGSA. James was a former client of mine from December, 2001. He was 53, Irish and separated with two teenagers. In 2001 he was in Year 2 of a local VTOS programme and needed help with the CAO to enter full-time third level education as a mature student. He had been in a serious accident some years earlier and was on permanent disability with a brain injury. He had been forced to opt-out of the conventional workforce as he 'couldn't go back and do the job I used do [machine setter]'. James returned to education for a new career route

as he 'didn't want to spend my days sat in the corner, which I could have done, relying on my pension, watching the television and getting a...square eyes'.

I had not spoken to James since 2001. By 2006 he had achieved a Higher Certificate in Computing despite being the only student on the programme for two years. He had then transferred into a 4-year BSc (Hons) in Applied Computing in September, 2004. However, three months into the BSc, due to a family crisis, he was forced to take time out and defer the remainder of the academic year. He stated:

basically, my thoughts were all over the place...I couldn't concentrate on the course and what I should be doing...and everything else, so I took a deferral, with the intention of going back in the following September [2005], which I have done, and as of now I have seen out the first year of that kind of a thing.

James had stated in 2005 that he had benefited in a number of ways from guidance intervention: returned to learning after a number of years; started suitable education/training course; feel more self-confident; and now working towards a goal that is achievable. In the 2006 interview he said that guidance had been helpful as 'I took the information from a person [guidance counsellor] who had been through the system and knew what it was all about'. He found the information invaluable and this 'gave me details of my options and helped me make a good choice'.

Despite taking the deferral, which set him back a year, James was very positive about his education progression in 2006. He had strategically used VTOS initially 'as a gauge to see whether I was capable of retaining information or not'. Ten years ago James had to relearn everything and believes he 'got back into education at the right time as there was a danger of learning bad habits' during his rehabilitation. He said that:

it used to be that a couple of years ago if it happened to ya, you were a write-off and that was it...it is only now that they are discovering that it can renew itself [brain pathways].

Nonetheless, returning to learning posed specific cognitive challenges for James. He explained:

Now I know that we all have our moments and that we forget things and sometimes I do, it just requires more concentration. The way that I get around it is, I am after getting very good at developing, 'work arounds' is what I call them, and what I think is great is ahm, what do you call

them, mind maps...and, because, if I have learned nothing else I've become very adept at realizing that a picture is worth a thousand words, that you can see more in a drawing than you can out of this is what you do...step one, step two, step three, step four kinda thing...that you can see more, you can visualize it more, that the area of visualization is far better, with me anyway than words.

In 2006, James still had two more years of study ahead of him and had noticed a marked difference in the level of the degree which had become more difficult.

Reflecting after this interview I saw the value of follow-up interviews in client tracking. As I had not spoken to James for quite a while I was totally unaware of his experiences since entering third level. It had been a particularly lonely journey for him. His story emphasised the difficulties that learners with disabilities or specific learning problems experience in their education and career progression. It also showed the focused career decision-making he used when retirement is presumed to be the next stage of career development in this particular age group.

James returned the transcript on the 19<sup>th</sup> June, 2006 with no amendments or additional comments made. I then reviewed my interview style and questions for Case 4. Despite my previous history with the client I had kept on track in this interview as the questions were becoming more focused with the emergence of new concepts in the data.

***(iv) Owen (Case 4)***

On the 14<sup>th</sup> June, 2006 the fourth client interview (Case 4) was carried out in Enniscorthy Enterprise Centre, County Wexford. The location accommodated the client who lived in the area. Owen was 29, Irish, single and a part-time farmer, full-time employee and part-time student. Despite doing well in his Junior Certificate, Owen left secondary school without a Leaving Certificate because he had 'just wanted to farm at that time'. In his early twenties he had completed a Certificate in Farming with TEAGASC to enable him to take over the family farm.

However, by 2001, following in the footsteps of his brother, Owen decided he needed to look at other long-term career options as 'the future wasn't great for farming'. He

received guidance from a colleague in REGSA. By 2006 Owen had achieved a distinction in the Institute of Accounting Technicians in Ireland (IATI) accountancy exams through a local part-time evening course. He was now working full-time in an accountancy firm 42 kms from home, studying for a professional qualification as a Chartered Accountant and working part-time on the farm. He had chosen accountancy because he had always liked the subject and had gained experience doing the farm accounts.

In 2005 Owen listed a number of benefits from guidance intervention: returned to learning after a number of years, started suitable education/training course, feel more self-confident and now working towards a goal that is achievable. I asked him more about this in the interview. He said his expectations had been met as 'REGSA gave me the confidence to go and...I suppose they told me that you can do it'. He had an idea he wanted to do accountancy but because of lack of information 'I didn't know how to go about it'. However, following guidance intervention in 2001, Owen had to make a number of personal changes before he was ready to pursue any type of further education.

He stated:

well I probably wasn't ready at that time. I would say a year or two after that...I knew I wasn't going to be ready for a year or two because of the way I was at home...the commitments I had at that time, work commitments.

We then talked about his progression to date. Owen was extremely pleased with his progress despite the challenges of working full-time in one profession and part-time at home on the farm. He stated that:

I am happy with the way it's went, well considering that three years ago or so, I only had a Junior Cert and now...I was someone that hadn't the Leaving Cert, dropped out of school and now I am studying to be a Chartered Accountant...

In spite of his new career he did not want to give up farming completely as it was a significant part of his life and his parents' lives. Pursuing his career goal meant that he did not have a 'great quality of life...because when you're studying and working and farming you don't have a lot of time to yourself'. In 2006, he still had a few more years ahead of him to get his final chartered accountancy exams.

I had found this interview difficult at times as I tried to draw out information from the client. When the dictaphone was turned off Owen appeared to relax and spoke more freely. From that point onwards I took notes. Perhaps he had been inhibited by the presence of the dictaphone, in which case it may not always be a suitable data recording tool for research participants. I asked Owen if it felt like a long road at times. He said it did, but 'REGSA changed my life and only for them I would not be where I am now'. Despite the hard work and commitment involved 'in four or five years when you have your qualification it's worth it'. Owen's long-term career decisions reflected the situation of many Irish farmers forced to seek guidance in recent years because of the economic changes in the farming sector. He returned the transcript a short time later with just a few minor spelling and interpretation changes noted.

By the 14<sup>th</sup> June, 2006, with four individual interviews completed, I had identified a gap in the data. As I still had not interviewed a client who had achieved a qualification and full-time employment, I selected a former client of mine from a local further education programme. However, this client cancelled on the morning of the interview. She was hesitant to reschedule, and due to time constraints I decided to select from the remainder of my target group.

**(v) *Derek (Case 5)***

The final client interview (Case 5) was carried out on the 10th July, 2006 in the client's workplace, a homeless shelter in Waterford city. Derek was 54, Irish and had achieved a BSc. in Social Studies in Social Care in 2005. Derek had initially received guidance from me in 2001 on re-entering education because he 'didn't know where to go, didn't know where to turn to'. He had a number of subsequent guidance sessions with me during his educational journey. After the first guidance session, he secured a last minute place on a third level Foundation Course. He then progressed on to the full-time BSc in 2002.

Since leaving secondary school, Derek had spent many years in low-paid jobs to support a growing family. Returning to education had been a long-held dream. However, for a long time Derek had been thinking:

the only kind of a job that would be anyway financially beneficial to me was if I had an education, I was looking at the bigger picture.

On completion of his BSc degree in 2005, he had made a promise to himself that:

when I finished college that I wouldn't go to the Labour Exchange. I felt with a degree under my belt...it could be habit forming, so I wanted to work.

By 2006 Derek had been employed as a key project worker with the city's homeless community for almost a year. He stated:

I never thought I'd realize my ambition. I've always had this thing about homeless people and ahm, when I did social care and that you get involved with homelessness through social care that's the area that I wanted to go to.

At one point early in the interview I had to pull him back to the research questions as we were getting totally sidetracked with his job which was an indication of the passion he had for his new role.

Even though Derek spoke about the possibility of further learning, he had found that the 'four years was enough for him'. He said that the leap from the Foundation Course to the full-time degree was

the hardest thing I ever did, 'cos even when I had done the Foundation course, it was with all mature students.... whilst this was with kids, as I would call them. And ahm, 'twas nerve-wrecking, it was the hardest thing I've ever done in my life was the first day to go into college.... and sit in the place but, ah, after a month of being there I blended in really, really well with them. And to make it worse then there was 63 of us in the class and there was only 3 male...

Derek said in 2005 he had benefited from guidance as 'I was encouraged to pursue goals that I never thought were possible'. Elaborating on this in the research interview Derek said that without guidance 'I don't think I would have gone any further'. I then discovered that, unbeknownst to me, after our first guidance session in 2001, when he left the office he was 'kind of fifty/fifty, will I or won't I?' He reiterated 'without guidance I wouldn't have done it and I was glad I was thrown in at the deep end'.

In 2006, Derek was extremely proud of his education and career progression. He stated that he had ‘achieved a lifetime’s ambition...I am proud...I know my family are proud of me’. He explained:

I basically was happy with that...just to get a wage, to keep my family going but I feel I’m in a responsible job, it’s a caring job...it’s something that I always wanted to do. I would have done it thirty years ago but again as I said the finances weren’t there.

This research interview was particularly illuminating for me. Derek’s indecision after his first guidance session in 2001 highlighted the choice that the client makes to engage with guidance or not. Even though I had met Derek for five guidance sessions from 2001 to 2002, he had never talked about winning a scholarship in secondary school, his reasons for leaving school early, and his self-doubt and preconceptions of college life. His increased self-confidence was evident when he spoke of the responsible position he now had working with the vulnerable in the community. Derek returned the transcript a short time later with minor spelling alterations and a note to say that ‘without guidance I wouldn’t have pursued higher education’.

After this final interview I decided the richness of the data yielded from the five client interviews was sufficient for saturation at that point and it would be more beneficial to the research to follow-up the five clients again in the closing stages of the study. The data collection from the follow-up telephone interviews is discussed in 7.3.1. The data analysis and findings from the individual face-to-face interviews are dealt with in Chapter 8.

### *7.1.3 Focus group interviews*

Following an examination of the concepts that emerged in the client interviews I identified some issues that needed further exploration from another perspective (Morgan, 1997:23). On 26<sup>th</sup> September, 2006, I returned to the field to carry out two focus group interviews with guidance practitioners in the United Kingdom (UK). This opportunity arose through my facilitation of workshops during the annual National Adult Educational Guidance Association (NAEGA) Conference.

Despite the constraints of the field situation, in that I could not handpick the participants and the attendance numbers were high (*n*44), these naturally occurring groups can be viewed as a source of focused data collection (Morgan, 1997:43). The practitioner group interviews provided a more extensive understanding of the issues involved in measuring long-term progression in practice and triangulated the primary data by using another source (informants) and another method (short questionnaire).

I deliberately chose adult guidance practitioners from the United Kingdom (England, Scotland, Wales and Northern Ireland) as my data source for two reasons. Firstly, in order to maintain objectivity, I decided it might be beneficial to address the relevant issues with guidance practitioners who were not engaging with the DES client tracking system. Secondly, as the development of the AEGI has certain similarities with adult guidance in the UK, I anticipated that the multiple experiences of practitioners working in a longer established sector would be valuable to the research.

As validity in focus groups “depends not only on the procedures used but also on context” it is important to provide a contextual background to the data collection and findings from the UK focus group interviews (Krueger, 1994:31). A brief glossary of key terms related to provision in the UK is available in *Appendix H*.

In 2006 adult guidance provision and funding arrangements varied enormously in the UK with some sectors experiencing, and still undergoing, major structural changes. Each of the four countries has its own centralised management system. Watts (2006:1) states that prior to devolution in the United Kingdom (1997) the basic structures of career guidance services were broadly similar in the four countries (England, Northern Ireland Scotland, and Wales).

However, post-devolution, the marketisation (contracted providers) of careers guidance services went further in England than the other three home countries (Watts, 2006:1). This has resulted in career guidance provision taking somewhat different directions in the

UK overall. England has sought horizontal integration of services for young people and adults respectively. Horizontal is the integration of career guidance services for young people into a wider range of services for young people (Connexions) and a similar integration of services for adults (*nextstep*). In contrast, the three home countries (Northern Ireland, Scotland, and Wales) have opted for vertical integration of career guidance services for young people and adults into an all-age career guidance service.

Watts (2006:1) argues:

The model adopted in England has already weakened the structures for career guidance provision, and is currently at risk of weakening them still further.

(Watts, 2006:1)

In England, *nextstep*, operating under the aegis of the National Learning and Skills Council (NLSC), has been the main provider of publicly funded information, advice and guidance (IAG) to adults (iCegs, 2008: 39).

By 2006, in line with international developments, policy changes had already been instigated in career guidance provision in England. There is now an increasing emphasis on the development of the country's human capital for productivity, economic growth, and social justice (Hughes, 2007:3). Following the government's *White Paper on Skills* (2005) a cross-government review of IAG services for adults in England was instigated in 2005 (iCeGS, 2008: 2). This review of IAG arrangements and the *Leitch Review of Skills* (2006) found that in order for adults to improve skills, employability and progression in their careers they need to be able to make informed choices (Hughes, 2007:3).

The focus over the next two years will be on the further blending of the English government's economic and social policy goals within central and local delivery plans (Hughes, 2007:9). The newly launched Adult Advancement and Careers Service (2008) forms part of the government's all-age strategy for careers/IAG work in England (Hughes, 2007:2). This new, universal careers service for adults will be fully operational by August 2010 (Bimrose et al, 2008:28).

In terms of outcome measurement and quality assurance, there are some similarities and differences between current practice in the AEGI (Ireland) and adult guidance provision in the UK. Hughes & Gration (2006:8) find that all key IAG providers in the UK collect data on outcomes of the service provided. However, even though these outcomes are usually in terms of the numbers of users progressing into work/training/learning, the relationship between the service provided and the outcome data is not always clear.

As is the case with the AEGI, there is often a requirement in the UK to report such outcome data against performance targets associated with education and employment (*learndirect* and *nextstep* in England; *Jobcentre Plus* in England, Scotland and Wales; and EGSA and the Department of Employment and Learning (DEL) in Northern Ireland). For other providers though, including Careers Wales and *learndirect Scotland*, even though relevant data is collected, there are no corresponding targets currently in use, and no formal reporting requirements to the relevant funding bodies.

The client tracking process in the UK also has similarities with Irish practice. It can vary across providers and is carried out in a number of ways including: directly via follow-up telephone interviews, database systems and *signposters* (individuals and organisations to provide information) (Hughes & Gration, 2006:8). Furthermore, in terms of cost-benefit, despite the wealth of data collected by organisations on the main aspects of service provision, there is still little evidence on the costs of delivery and the outcomes of delivery (Hughes, 2007:10).

However, despite proposals for a quality framework in the Irish guidance services, Ireland is still behind the UK on the issue of formalised quality assurance (QA) systems. All key IAG providers in the UK operate within formalised systems of QA invariably based on self-assessment and continuous self-improvement (Hughes & Gration, 2006:7). The majority of these are linked to externally regulated standards such as *matrix* or *Charter Mark* that involve some method of user feedback such as telephone interview, postal questionnaires and focus groups.

More recently, though, there has also been a growing emphasis on moving beyond the provision of ‘customer service’ feedback to include the client and other relevant stakeholders in the design and delivery of services (Hughes, 2007:10). So far, this has not been satisfactorily addressed in the adult guidance services in the UK, nor in Ireland.

At the time of the focus group interviews in 2006 I was aware of some of the underlying issues and changes effecting adult guidance provision in the UK. Conscious of time constraints and to ensure validity, two methods of data collection were used in the focus group interviews. Firstly, a very short structured questionnaire with three open-ended questions was designed to capture the key perspectives of the practitioners. See *Appendix I* for a copy of the questionnaire.

The three focus group interview questions were:

- 1) *What is your definition of progression for clients?*
- 2) *Is it [progression] the same as ‘stakeholders’ in your organisation (i.e. your employers, funders, policy-makers)? Yes/No, please explain further.*
- 3) *To what extent do you think clients’ progression is being measured adequately in adult guidance?*

Secondly, general feedback from a discussion of the research questions in the two groups was recorded by me on a flipchart. As these were instructional workshops, participation was voluntary and I did not know the identity of the attendants beforehand. Therefore, I sought the participant’s agreements to contribute to my research by providing a descriptor at the top of the questionnaire. To maintain anonymity I requested a Professional Title/Role only.

Overall, forty-two questionnaires were completed by forty-four participants in the two workshops. A sample of participants from across the four countries, England, Scotland,

Wales and Northern Ireland were in the two workshops. See Table 7.1 for a profile breakdown.

*Table 7.1: Profile of participants of focus group interviews*

<b>Professional Role</b>	<b>Nos</b>
Guidance Development Co-Ordinator/Adult Education Development Officer	3
Personal Adviser	1
Team Leader/Manager (IAG service)	13
Community Guidance Worker/Community Development Worker/Manager	5
Educational Adviser/Director/Student Support	5
Careers Adviser/Adult Guidance Adviser	13
Academic/Consultancy	3
Employment Officer	1
<b>Total</b>	<b>44</b>

The format of both workshops was exactly the same in duration (1.5 hours), content and delivery. To provide a context for the data collection I delivered a powerpoint presentation on the research topic. Mid-way through the presentation the questionnaire was administered to all the participants. They were requested to discuss the three research questions in small groups of 2 and 3 and then to self-complete the questionnaires individually. The time frame for this activity was approximately fifteen minutes.

A general group discussion then followed which encouraged disclosures and provided insights on current practice across the different sectors (Krueger, 1994:15). The feedback that was recorded on the flipchart will now be discussed. The limitation of this method was it could only provide a snapshot of perspectives because of the large numbers in the groups and the time constraints of the sessions. However, the universality of the practitioners' experiences emerged in the discourse. It was apparent that there was considerable tension and unease about the constant changes taking place within the sector. Specific issues related to the insecurity of contracts and their impact on provision of services to clients.

Overall, in relation to Question 1, “*What is your definition of progression for clients?*”, there was a general consensus amongst the participants that it was extremely difficult to define *progression* ‘as it is not tangible’. Through a ‘person-centred’ approach the guidance process itself ‘enabled’ clients to ‘discover and utter possibilities’ and ‘alternative options’ to progress. Following guidance intervention progression was seen as the ‘taking of first steps’ and ‘movement towards an individual goal’ or ‘achievement’ which is specifically ‘identified by the client’. Progression for the client involved the development of ‘soft outcomes’ such as ‘self-determination and self-esteem’. It was also viewed as ‘similar to the learning cycle....action, inaction and reviewing’.

In terms of the measurement of progression by stakeholders (Questions 2 & 3) there were mixed opinions on this amongst the participants as practice varied considerably across the sector. However, general feedback suggested that ‘target’ and ‘impact’ measurement with ‘defined outcomes’ for ‘learning and work’ was being used by various stakeholders as well as the Adult Learning Inspectorate (ALI). Variations on the rationale for this type of measurement included ‘politically driven’, ‘funding driven’ and for ‘best practice’. Some participants gave examples of where regular tracking was being carried out including Careers Wales (every 6-9 months) and Hertfordshire Careers Service (3-6 months). More substantial data was provided in the self-completed questionnaires. The analysis and findings from the focus group questionnaires are addressed in Chapter 8.

#### *7.1.4 Unobtrusive observations*

As a support to the primary data collected from the individual and focus group interviews, two unobtrusive observations were carried out at different points in the fieldwork in Ireland and Finland (Robson, 2002:312). The primary focus of both observation visits was to investigate how client tracking is managed during and post-guidance intervention in the organisations. Early in 2006 changes were regularly being made to the AEGI Adult Guidance Management System (AGMS) in line with feedback from the adult guidance projects on the ground. As the main quality assurance problem identified in the earlier 2004-2005 REGSA study was the difficulty of tracking client

progression longitudinally, I wanted to observe how alternative adult guidance providers addressed similar issues in their client data management system.

Initially, I decided to carry out only one observation visit in an Irish organisation in 2006. In 2008, a second opportunity presented itself through an Academia Exchange programme to learn about career guidance systems in another European country. During the visit I had the opportunity to observe a Finnish client data management system. The comparative analysis of the two client data management systems situated in national employment services provides another perspective on the research topic.

The two short, single observation visits were unstructured and informal. In both situations I negotiated access with the key gatekeeper in the organisation who worked directly on the client data management system. They allowed me to observe the operation of their client data management system and facilitated my questions during the meetings. Field notes were recorded in my fieldwork diary and typed up shortly afterwards.

The most recent statistics show Ireland's population at 4,239,848 (source: CSO, 2006) and Finland's at 5,300,484 (source: Statistics Finland, 2007). Current unemployment rates are at 11.4% in Ireland (CSO, April, 2009) and 8.3% in Finland (Statistics Finland, March, 2009).

In terms of participation in lifelong learning, 8% of 25-64 year olds in Ireland are in receipt of some form of formal and non-formal education (CSO, 2006:2). In an email to the researcher (Jan, 2009) AONTAS clarified that it estimates there are approximately 300,000 (7%) adults engaging in learning annually in Ireland. In comparison, the annual number of participants in adult education in Finland is 1.7 million, which is approximately 50% of the working age population (CIMO et al, 2008:2).

There are also distinctly marked differences in adult guidance provision in the two countries. Currently, in Ireland, the AEGI has responsibility for educational and career guidance and FÁS has responsibility for labour market support in the public employment sector (PES). In contrast, the Finnish public employment office, known as Työvoimatoimisto, has sole responsibility for labour market support and for information, guidance and counselling services for all clients outside of the formal education system. This involves a multi-disciplinary team of employment officers and vocational guidance psychologists.

The first observation visit was carried out on 1<sup>st</sup> March, 2006 to the Head Office of FÁS, the Irish Employment and Training Authority, in Dublin. FÁS comes under the aegis of the Department of Enterprise, Trade and Employment (DETE) and has a “statutory obligation to provide careers information and guidance services to employed and unemployed adults”, (NGF, 2007b:33). It plays a key role in the government’s lifelong learning policy initiatives through facilitating training and employment programmes to enhance the skills and competencies of the workforce (FÁS, 2006:2).

Nationally, FÁS has 66 offices and 20 training centres. Career guidance in FÁS is under the remit of the Employment Services of the DETE, which encompasses mainstream employment services and the Local Employment Service (LES) for the long-term unemployed (Philips et al, 2006:14). The quality assurance models used by FÁS in its employment and training services are ISO, EQIA and Excellence Through People (ETP).

I chose FÁS for my observation visit as it has a number of similarities with the AEGI. Both FÁS and the AEGI work closely together for a two-way referral of clients; FÁS has an extensive local and centralised client data management system; and FÁS was part of the 2002 OECD review of career guidance policies in Ireland. At the time of my observation visit in 2006, FÁS was in the process of implementing an enhanced Caseload Management System (CMS). The re-design of the CMS system was an outcome of a consultation process within the organisation. The new system was being piloted in some

of the FÁS centres to test the usefulness of the application in a ‘real’ environment. This generic database system records client activities from first contact to completion of FÁS support. The CMS is used by the DETE to monitor client activities locally and nationally.

Prior to this visit I had identified a number of research questions. The questions evolved from the examination of quality assurance processes and client tracking systems in the preliminary literature review, and my own personal experience of using the AEGI adult guidance management system (AGMS). The research questions I had identified were:

1. *What is the function of the FÁS Caseload Management System?*
2. *Is it based on a particular theoretical model?*
3. *How is it managed?*
4. *Who has access to it?*
5. *How long are client records held on the CMS?*
6. *What client information is stored on the CMS?*
7. *What confidentiality issues are involved?*
8. *Is the system used for the longitudinal tracking of clients?*

My visit to FÁS Head Office was facilitated by the IT Co-Ordinator responsible for the upgrading of the system and lasted approximately two hours. The main focus of the visit was to observe the CMS in its various operational stages. During the session I was given an overview of the internal structure of the CMS, the theoretical framework that forms the basis of its design (Ali & Graham model) and a demonstration of its application.

In April, 2008, prior to my visit to Finland, I contacted the FÁS I.T. Co-Ordinator by email to check on the progress of the national upgrading of the CMS. At that point it had been fully rolled out in all regions and a review had been conducted on the system. The I.T. Co-Ordinator stated that some modifications and improvements had been made to the system based on feedback from the Employment Service Officers (ESO) on the ground. As part of quality assurance in FÁS, the CMS continues to be enhanced based on feedback and business process requirements.

I returned to the field to carry out the second observation visit on 16<sup>th</sup> April, 2008 in a Finnish public employment office. In this particular observation emphasis was placed on learning about quality assurance processes used to evaluate outcomes in the Finnish guidance system. In Finland, there are two established guidance and counselling systems in the public service. These are guidance and counselling provided within the public school system and vocational guidance and career planning provided by the labour administration. An evaluation in 2001-2002 of educational guidance and counselling in the public school system found shortfalls in provision that are now being addressed (Numminen & Kasurinen, 2003:3). More recently, from a policy context “the national educational and labour market policies are emphasizing individual learning programs from a lifelong learning perspective” (Felt et al, 2007:1).

Like Ireland and the United Kingdom, career guidance policy in Finland is being driven by the achievement of national economic and social policy goals related to increased productivity and the development of a highly skilled workforce. The Finnish model of vocational guidance and counselling is now being re-developed with a strong focus on quality assurance in the school and public employment sector. In 2006 a government action plan for the *Development of Information Services, Advice and Guidance in Adult Education (2007-2013)* was proposed (Ministry of Labour, 2006). This has involved the implementation of a national co-ordination project (2008-2011) to support and guide the development of career guidance and counselling for adults.

Unless they are full-time students, the vast majority of Finnish adults avail of career guidance through the public employment service (PES). Mid-way through the Academia exchange programme I spent one day in the public employment office in Lahti, which is situated in the Päijät-Häme region (pop. 200,061), where I learned about the importance of quality assurance in the Finnish PES. Our Academia host arranged for me to have a private meeting with the employment office’s vocational psychologist during this visit.

The research questions for this observational visit were:

- 1) *What type of client data management system is used by the Finnish PES?*
- 2) *Who has access to the system?*
- 3) *What type of client information does it store?*
- 4) *How long does it hold client records for?*
- 5) *What confidentiality issues are involved?*
- 6) *Is it used for longitudinal tracking of client progression?*
- 7) *Are there comparisons to be made with the FÁS and AEGI systems?*
- 8) *What can be learned from a QA system used by guidance providers in another EU country?*

Prior to my meeting with the vocational psychologist information was given on the employment supports available locally and nationally. This included a presentation by the vocational psychologist on the specific role of vocational guidance within the PES. Unlike Ireland, there are dedicated vocational psychologists (*n*260) working in the Finnish employment offices providing vocational guidance to young people and adults.

After the presentation the vocational psychologist facilitated my observation of the generic client data management system (called URA) used in all of the public employment offices. This meeting lasted approximately thirty minutes during which time I was given a quick demonstration of the URA system. Like the CMS operated by FÁS, the URA system is used by the Ministry of Employment and the Economy (MEE) to gather statistical information on users of the PES.

The purpose of the observation visits was to learn about alternative quality assurance processes and client data management systems used by other adult guidance providers. A comparative analysis of both systems and the current AEGI client data management system (AGMS) highlights similarities and differences between all three systems for future design considerations. *Table 7.2* provides a comparative analysis of the three country models.

Table 7.2: Comparative analysis of three country models

	AEGI (AGMS)	FÁS (CMS)	Finnish PES (URA)
<b>Features</b>			
<b>Client profile</b>	Specific target groups	Registered unemployed	Employed and unemployed (all ages)
<b>Remit of provider</b>	Education and career guidance	Labour market support	Vocational guidance and labour market support
<b>Monitoring department</b>	Education	Enterprise, Trade and Employment	Employment and the Economy
<b>Client database: design</b>	Does not use client action plans	Uses client action plans (theoretical basis)	Uses client action plans (no theoretical basis)
<b>Client database: access to client information</b>	AEGI service staff only	FÁS and inter-agency staff	PES staff but privacy limits for clients of vocational psychologist
<b>Client database: outcome monitoring</b>	Local and national	Local and national	Local and national
<b>Client data: methodology</b>	Quantitative, although qualitative proposed for future evaluation	Quantitative	Quantitative and qualitative
<b>Longitudinal tracking</b>	Tracking not being conducted	Tracking ceases at point of entry to employment	Certain level of tracking used for evaluation

With regard to similarities, all three service providers have a similar guidance role. The role is to support clients in their education and career progression and achieve national public policy goals determined by their individual government departments. The different departments in Ireland (DES and DETE) and Finland (MEE) operate a ‘top-down approach’ through the regular monitoring of immediate outcomes and service activities.

The primary function of all three service providers’ client data management systems (AGMS, CMS and URA) is to record client information and track client progression, albeit to certain degrees. Currently, the longitudinal tracking of progression does not appear to be a major priority across the three providers. Longitudinal tracking is not conducted in the AEGI, FÁS track to the point of ‘entering employment’, and the Finnish PES track clients for short-term evaluation only. In terms of categories for outcome measurement, the final outcomes in the AEGI are either *education* and/or *employment*. In FÁS and the Finnish PES the final outcomes measured are *employment*.

With regard to using the client data management system for quality assurance purposes, the Finnish PES is more focused and efficient in its regular evaluation of the vocational

counselling service. It also recognises the importance of a mixed method approach (quantitative and qualitative) in its evaluation procedures. It is understood anecdotally, following the 2005 formative evaluation (SPSS, 2005), the NCGE is currently undertaking a summative evaluation of the AEGI. This may possibly involve both types of methods.

In terms of differences between the individual client data management systems I observed one significant divergence related to the quality of design. Compared to the AGMS, the CMS and the URA are more sophisticated in that they use structured client action plans with printouts given to the clients at the end of each session. The two advantages of formalised client action plans are that there is a record of the guidance session on the data management system, and a printed action plan places responsibility on the client to follow-up what has been decided upon in the guidance session. The AGMS does not have such a facility. Instead, notes on client activities are recorded on the system by the practitioner during or after the guidance session. These are not physically given to the client. Therefore, the method for recording decisions or actions to be addressed is entirely at the discretion of the guidance practitioner.

Finally, another significant difference between all three client data management systems relates to the issue of confidentiality and the sharing of client information. In both FÁS and the Finnish PES, the access and sharing of client information is more indiscriminate due to benefit monitoring. In contrast, the AEGI projects have better data protection standards as only the local adult guidance service has access to its own client records. Individual client information is not shared with other services or with the DES. This ensures a considerable level of confidentiality between the guidance practitioner and the client in the AEGI services.

A more detailed report documenting the evidence from the two visits is presented in *Appendix J*. The overall findings from the two observations do not form part of the

primary data analysis, but they contribute to the discussion on the design of a best practice framework for the longitudinal tracking of client progression in Chapter 9.

## **7.2 Data Collection of Secondary Documents**

Following a comprehensive literature review, a more in-depth mapping of the discursive practices in Irish policy literature was undertaken as a secondary data source. An interpretive approach was used to analyse manifest and latent content in a sample of Irish policy documents on the position, role and outcomes of adult guidance within the lifelong learning agenda (Bryman & Bell, 2003:200). This necessitated probing beneath the surface in order to ask deeper questions on the topic in the sampled policy documents.

### *7.2.1 Irish policy documents*

For a longitudinal analysis, quantitative data was collected from a selection of key Irish policy documents from 1997 to 2008. Purposive sampling was carried out on a representative range of eighteen documents during this period. *See Appendix P* for list of documents. The selection encompassed four specific types of documents:

- (i) Five national government economic plans and frameworks.
- (ii) Four government department policy plans.
- (iii) Five consultative policy reports.
- (iv) Four national reviews of guidance policy and practice in Ireland.

The focus of the data collection was to gather data from the documents on the position of adult guidance in the policy discourse, the role of lifelong guidance to support the three OECD public policy goals and the construction of progression (outcomes).

The precise research questions that guided the data collection and analysis of the policy documents were:

- 1) *Where is adult guidance positioned in Irish policy discourse?*
- 2) *What is the role of lifelong guidance in relation to the three OECD public policy goals of learning, labour market and social equity?*
- 3) *How is the concept of progression constructed in Irish policy discourse?*

Content analysis was used to collect and analyse the data in the documents. The coding and analysis of data was based on the significant themes that were found in the literature review. However, whilst content analysis is viewed as an objective method of analysis because of its quantitative nature, a limitation of the method is its susceptibility to bias on the part of the researcher (Cohen et al, 2007:490). As there is little policy literature in the field of Irish guidance, this provided limits to the type and numbers of documents suitable for analysis. The data analysis and findings from the secondary data are addressed in Chapter 8.

### **7.3 Close of Fieldwork**

The fieldwork came to a close (Stage 3) at the end of February, 2009 when the follow-up telephone interviews were completed with the clients.

#### *7.3.1 Follow-up client telephone interviews*

All five clients were contacted by letter in early February, 2009 to gauge their willingness to participate in a short follow-up telephone interview. The consent letter restated the ethical conditions of the research design. A copy of this letter is available in *Appendix K*. A proforma questionnaire was designed that included prompts and probes for a brief, focused telephone interview on the clients' progression experiences by 2009 (Cohen et al, 2007:380). This is available in *Appendix L*.

Four out of the five clients agreed to be contacted for a telephone interview. Owen (Case 4) did not return the consent letter and I decided not to pursue the issue further due to time constraints. He may not have wanted to participate further, or there may have been other reasons for the lack of response, such as postal problems.

The four telephone interviews were conducted between the 26<sup>th</sup> and 27<sup>th</sup> February, 2009. They were approximately twenty minutes in duration. All of the clients had experienced some change of circumstances since the research interviews of 2006. The following is a brief summary of the four clients' progression paths between 2006 and 2009.

*(i) Joan (Case 1)*

When I interviewed Joan in 2006 she was still waiting to start the MA in Art Therapy in Cork. It finally began in Autumn, 2006 and she qualified with an MA in June, 2008. The course was part-time and involved attendance in college two days per week, a number of different work placements and weekly personal therapy. She commuted to Cork weekly, and stayed over one night during the week.

When I spoke to Joan in 2009 she told me the period since 2006 had been extremely busy and challenging for her. She had qualified in June, 2008 and had gotten married shortly afterwards. In September of that year she returned to her full-time primary teaching post to recoup her finances and re-evaluate her career situation. She said that she had needed the breathing space to recover from the emotional demands of two years in college, gather her thoughts and do some research on her future options. In February, 2009, she was considering a number of possible routes into the Art Therapy field. The options included voluntary work, job-sharing, and workshop facilitation for primary school teachers. At that point she was cautiously 'testing the waters' first, before deciding whether to leave the security of her full-time position.

Joan had encountered some obstacles over the two years in college. She found the MA emotionally challenging as it had involved a lot of personal development work. Even though she was eligible for a grant, finances were a constant constraint because she only had an income from her full-time teaching post during the summer months. However, she had been resilient and stated 'you find a way to do something you love'.

Apart from the qualification outcome, Joan had acquired a number of soft skills over the two years of study. She had developed communication, facilitation, and people management skills. More importantly, she felt she now had a better 'awareness of boundaries' and more 'self-belief' in her abilities. She also had the necessary confidence to 'sell' herself to relevant organisations and further establish herself as an Art Therapist.

Joan still felt guidance had been beneficial to her and stated that ‘I would not be where I am today without it’. She was grateful for the ‘focus it gives’. She had not received guidance since 2004, but would consider it again if she needed help in the future. She was still agreeable to longitudinal tracking as it was a method to keep her ‘on track in her career path’. Joan felt tracking was a ‘way of giving back something to the service’. Reflecting on her progression since 2003, she stated the journey had been ‘about following my heart and trying to find balance’.

**(ii) Katherine (Case 2)**

In 2006 Katherine had taken a break from her third level studies but had stated that she intended to go back to college in September of that year. When I interviewed her in February, 2009 she had not returned to college and did not intend to do so. Since 2006, her family commitments (weddings and new grandchildren) had been an obstacle, as well as the age issue. Her earlier aspirations of a college qualification had diminished. She stated ‘I’m over sixty now, I’ll leave it to the younger people’.

Despite this change in attitude, Katherine was still extremely active in her retirement. She had taken up voluntary work in the local community. She was working with the Sexual Crisis Centre to support survivors of sexual assault. She was also Area Council President of the St. Vincent de Paul. This type of work involved a lot of client assessment for financial support. In both areas of work Katherine had had to develop her listening skills. She stated that the Communications Module in her undergraduate programme had been particularly helpful for developing her communication skills.

Katherine still felt that guidance had been beneficial when she first sought it in 2001. Since then her daughter had also availed of guidance from REGSA. Katherine was still agreeable to participating in longitudinal tracking. She felt she still had something to contribute to society and that voluntary work was an important outcome that should be measured in client tracking systems. As for the future, she wanted to keep doing the voluntary work and spend time with her family.

***(iii) James (Case 3)***

In June, 2006 James had achieved a Higher Certificate in Computing, progressed onto a BSc. in Applied Computing and just completed a full year of the programme. In February, 2009 I was really surprised to hear that James had not returned to the BSc in Autumn, 2006. He had dropped out of college and had no intention of returning. In effect, his positive outlook had completely changed since 2006.

I probed further and discovered that a number of obstacles had contributed to his change of circumstances. His health was the main issue. Despite what he had told me in 2006, he had not been coping well on the honours degree programme. His brain injury affected his memory and he had continuous learning difficulties. In addition, the next year on the BSc. would have required him to do an industrial placement and because he was no longer allowed to work he could not see a way around the problem. He had also listened to a family member who, out of concern, had questioned why he was pursuing a course that was stressful and probably would not lead to employment. More recent health problems had resigned him to thinking that 'there is no option for me now'. He said he had 'come to the realisation that I will never work again', and feels 'too old, too long in the tooth for working' now. His main concern was looking after his health.

I asked James whether he had sought assistance from the college support services at the time. He said he had tried a number of times to get extra tuition through the student support service but became disillusioned with the service. Despite visiting the service several times, he always dealt with a different person each time, there was no follow-up and he never got extra tuition. He had not mentioned this issue to me in the research interview in 2006 and he had not thought of contacting REGSA for additional support.

James said he was still motivated to learn and may pursue an Open University course in IT as he spends a lot of time on the computer. He was still agreeable to longitudinal tracking. Before the interview finished I suggested that he might want to consider working in the voluntary sector where he could use his computers skills to help people in

a similar situation. He said he would think about it and if he needed further guidance would contact REGSA. After the interview I recognised the value of client follow-up as I had no indication of James's change of circumstances. I also realised I had crossed the boundary of researcher into my practitioner's role by offering him advice. However, my empathy for his situation had taken over at that point as I felt he had been let down in some way by the academic institution he had been attending. I also believed that he had valuable skills that could be of assistance to others in an educational, voluntary or similar rehabilitation situation.

**(iv) Derek (Case 5)**

There had also been changes in Derek's circumstances since 2006. He had changed address but I was able to track him through his old address. He was still working with the homeless and his employment contract had been renewed annually. He was working flexible hours, including weekends, which made him more available to his clients. However, the weekend work was causing tensions in his family life.

Derek had not met with any significant obstacles in his career progression since 2006. He had developed professionally by doing a number of upskilling courses and liked to try out new therapeutic options to help his clients. He was still motivated to learn more and wanted to train as an Addiction Counsellor. The main obstacle again was the 'time' the training would involve and the personal costs to his family life.

Derek felt more confident and capable in his work with clients. Since 2006, the soft skills he had acquired were problem-solving, communication, presentation, listening and assessment skills. He also stated that he was more patient, and like Joan, had learned to set boundaries between his personal and professional life. Derek now takes work placement students from the BSc. Social Studies in Social Care programme as a way of 'giving something back to those who helped'.

In terms of benefits, Derek said that guidance ‘changed my life, I was going around in circles ‘til I got guidance’. He has had no reason to return to REGSA but would consider it if he needed help in the future. He was still amenable to longitudinal tracking and his opinions on outcome evaluation were the same as his 2006 interview. Finally, Derek said he was extremely happy in his job and had no plans to change any time soon.

#### **7.4 Conclusion**

This chapter outlined the process of investigation undertaken during the fieldwork stage of the research from March, 2006 to February, 2009. Data collection involved sourcing primary data through client interviews, practitioner focus group interviews and two observation visits. Additionally, secondary data was collected from a range of key Irish policy documents. Chapter 8 deals with the data analysis and findings from the client interviews, practitioner group interviews and the Irish policy documents.

## **Chapter 8: Data Analysis and Findings**

### **8.0 Introduction**

This chapter will discuss the methods of analysis and the findings from the primary and secondary data sources in this explanatory single-case study. As the client interviews of 2006 are the main data source in the study the chapter concentrates heavily on their analysis through within-case and cross-case analysis.

A combination of discourse analytical techniques were used on the primary (clients, practitioners) and secondary (policy-makers) data sources. Textual analysis was carried out on the five clients' career narratives for a close examination of their discourse on progression. Content analysis was used on the practitioner focus group questionnaires and the Irish policy documents for an analysis of how progression is represented in these two discourses. A synthesis of the findings from all three data sources will provide an analysis of the issue under investigation from a triangulated perspective. Due attention was given to issues of reflexivity and ethics, and the limitations of the analytical methods used.

### **8.1 Primary Data Analysis and Findings**

This section will address the methods of analysis and findings from the two primary data sources of individual face-to-face interviews and focus group interviews.

#### *8.1.1 Individual face-to-face interviews*

The process of *double hermeneutics* was used in the discourse analysis of the 2006 interviews to develop knowledge of the five clients' subjective and intersubjective experiences (Alvesson & Skoldberg, 2000:144). Even though the focus of the interviews was on the clients' experiences since guidance intervention, the content of the narratives demonstrate how their historical situations, their past, influenced their progression (Gutting, 2003:864). Therefore, textual analysis involved a process of deconstruction and reconstruction of the narratives for a deeper insight into how the clients made sense of their progression. Specifically, the analysis concentrated on both the intrinsic

(psychological) and extrinsic (sociological) contextual factors that influence the process of individual progression over a period of time (Ullah, 1990 in Fairclough, 1995:205). Intrinsic factors included the attitudes (decision-making), attributes and behaviours of the clients. Extrinsic factors comprised of relationships, events, and structures that influenced the progression process.

Preparation for analysis of the client transcripts involved re-listening to the taped interviews a number of times for tone and meaning, reading the transcripts in detail, and identifying appropriate sections in the transcript for a focused analysis of the discourse (Wood & Kroger, 2000:87). Special attention was given to the use of interpretive repertoires, such as adjectives, metaphors and analogies, and expressions of feelings in the clients' discourse. An extract from each client's transcript is signposted in his/hers *within-case* analysis and available in *Appendix M*. Each individual extract includes an excerpt of analysed discourse in the client's narrative.

In order to deal with the ethical issue of doing discourse analysis on the content in the transcripts I had to bracket off my own assumptions during analysis (McLeod, 2003:86). The exercise allowed me greater objectivity to scrutinise the emerging patterns and attend to the contradictions in the client's discourse. I addressed this through a number of reflexive questions:

- 1) *What is the client really saying here (meaning)?*
- 2) *How is he/she talking about the experience (tone, hesitations, and emotions)?*
- 3) *What type of expressions is he/she using to describe it? For example, adjectives, metaphors and analogies.*
- 4) *What is not being said by the client?*

Four specific areas were identified for analysis in the narratives: (i) progression experience, (ii) obstacles encountered, (iii) outcomes of guidance, and (iv) the client's contribution to the design of a longitudinal tracking system. Analytic induction was used to extrapolate patterns in segments of the highlighted discourse in each case transcript.

The initial summarising and packaging of the data in Case 1 allowed for the emergence of sensitising conceptual categories which were used as a start point for analysis of the subsequent four cases. A repackaging and aggregation of the overall data resulted in a refined set of conceptual categories. These conceptual categories are displayed in *Table 8.1*.

*Table 8.1: Interview data conceptual categories*

<b>(i) Progression experience</b>	<b>(ii) Obstacles</b>	<b>(iii) Outcomes</b>	<b>(iv) Contribution</b>
<i>conceptual categories</i>	<i>conceptual categories</i>	<i>conceptual categories</i>	<i>conceptual categories</i>
<i>progression process attitude to progression positive aspect negative aspect intrinsic factor extrinsic factor</i>	<i>personal obstacle structural obstacle strategy response</i>	<i>ultimate outcome hard outcome soft outcome goal client readiness</i>	<i>response to tracking amenability to tracking regularity of tracking methodology purpose outcome measurement language</i>

Within these conceptual categories a range of pattern codes were used for a *within-case* and *cross-case* analysis. The client transcripts data sets table is available in *Appendix N*. To explain the phenomenon of measuring progression a presumed set of causal links was identified in the data (Yin, 2003:120). A cross-case analysis of the data drew conclusions on the variabilities of the five clients' experiences by noting patterns and major themes in the discourse (p.100).

The reporting of the data analysis and findings was addressed in three phases and will be presented in a narrative form using direct quotations for emphasis and italicised pattern codes. To begin with, a case-oriented (*within-case*) approach considered the case as a whole entity for an analysis of the individual cases (Miles & Huberman, 1994: 174). A comparative analysis (*cross-case*) was achieved through *pattern clarification* and an examination of themes across the five cases (p.175). The patterns are displayed in a matrix table for elucidation. Finally, a summary of the overall findings from the five individual interviews is provided.

(i) *Within-case analysis*

The within-case analysis addresses the patterns and major themes found in each case vignette. The illustrative accounts of the five vignettes have already been presented in Chapter 7 (7.1.2).

***Joan (Case 1)***

Joan's narrative demonstrates an *evaluative* approach to her career and life situation. Prior to guidance intervention, she had engaged in a process of self-reflection over the course of a number of years and realised that she was not fully content in her career. During guidance she had evaluated her needs and abilities and decided that a new outcome had to be a career change. However, the suspension of the MA in Art Therapy in 2004 had caused her to re-evaluate her career situation again. A regular motif in Joan's narrative was the issue of emotional stress as a result of the constant re-evaluations she had to deal with in the interim two years.

Joan's experience is an example of a *delayed progression* path that was directly outside of her control due to the structural obstacle put in her way. As she had already identified her educational goal, her attitude to her lack of progression was both one of *frustration* and having undergone a *personal journey* of coping with the continuous set-backs. Her frustration is evident in the use of the metaphor of 'pulling my hair [out]', to describe the emotional impact of the lack of certainty of a specific start date for the MA:

L; And do you think that the education institution, you know, the college, do they have any idea of the impact that their decisions have on students? Their waiting to start..

N; Well they say they have been as frustrated as us, but, am, I suppose they haven't had the course running either, so there have been no Art Therapists going in to come out, you know what I mean, so I understand their frustration but at times I was just pulling my hair, going 'do you realize what you are saying', you know, they were very vague in their letters, there weren't, it was just the fact that nothing was definite with them, like, but they were patient with us, so.

**Excerpt 10: uses the metaphor of pulling her hair out to express the frustration at lack of progress**

See *Appendix M* further detail in extract 1.

The negative aspect of this delay was one of constant *emotional stress* at finding herself in a permanent *limbo-land*. A temporal metaphor is used to describe ‘the longest journey’ and the sense of *time lost* at this stage in her life as she struggled with the implications of these delays, ‘God, it will be two years time and I will be 31’.

In spite of these difficulties Joan had been extremely resilient in staying focused on her goal. Overall she was feeling *optimistic* and *hopeful for the future*. She acknowledged that there were several positive aspects to her delayed progress. In particular, the time out had brought a greater level of self-awareness and *personal growth*. As *finance* was a major personal obstacle, Joan responded by *sourcing new employment* because her career break could not be reversed. This had meant leaving her comfort zone, experimenting with new employment situations and letting go of certain personal strictures that had been holding her back.

One of these strictures was the effect of other people’s negative judgments and expectations on her self-concept. The lack of understanding from friends and colleagues had caused her to forget her ‘own opinion along the way’. In addition, with the demands of teaching she had lost sense of her boundaries, feeling constantly overworked and stressed. She described these personal blocks as a type of *tunnel vision* that prevented her from *thinking outside the box* to consider other career options. In particular, her new employment experiences required her to *break new ground* and really challenge herself.

The period of uncertainty between 2003 and 2006 had in fact brought greater *clarity of vision* and *confidence* in her career decisions. The process of moving forward was tempered by both an intrinsic factor and extrinsic factor. Intrinsically, *personal change had taken time*, and she had reached an acceptance that certain events are *outside her direct control* (extrinsic). She was more definite that she does ‘not want to stay in the system [primary]’, but wants to become an art therapist as the whole idea gives her a ‘buzz’. This self-realisation was evident in her tone of voice as she spoke excitedly of the prospect of this new career route.

As Joan's ultimate career outcome is a *new career* she still had a *sense of hesitancy* about her future. She had not yet achieved her desired *qualification* (hard outcome). The outcomes experienced, therefore, were primarily soft outcomes related to her personal development over the three years. This was evident in her *acceptance of her situation* and increased *self-confidence over time* which had led to a change in perspective.

She used adjectives to assertively describe her personal growth 'you know I realise I am flexible as well and that I can face any challenge really'. She recognised that as 'nothing amazes me anymore' she had acquired better *coping skills* and had become more *adaptable* to changing situations. Significantly, she had realised that the insularity of her previous employment made her very 'close-minded', and that leaving the security of this position had allowed her to become more *open-minded* to the possibility of new opportunities.

The issue of *psychological readiness* emerged in her acknowledgement that 'I think mentally, as well, I wasn't ready'. Taking the leap into the unknown required a *psychological shift* on her part, described as 'I needed something to move'. At the time of guidance in 2003 she was 'ready for change, of some description...and that it is only by looking back now that I can see that I am in a more ready position for study'. Ultimately, she argued that determining readiness is the *client's decision* and 'the onus is on the person to make that choice' as opposed to other individuals.

Joan described how she was *delighted* to find out 'that I was being followed up in a way' and was amenable to regular tracking. She saw the purpose of longitudinal tracking as a *legitimising of the client's experiences* and could serve as a *reminder that help is available*. In particular, it could show the *capriciousness of clients' progression* by *tracking the journey* from the first point of guidance to where the 'client ends up'. The information gleaned could serve to highlight the *spectrum of opportunities* that are opened up 'because of making the first appointment'.

In terms of methodology, Joan had ‘no problem being part of a statistic’ for quality assurance purposes, but felt that both *hard and soft outcomes* need to be captured in tracking systems. Questions should attempt to measure the *personal outcomes* of satisfaction with choices and decisions, learning outcomes, expectations met, possibility of further change and the client’s current situation. She described this as coming to guidance with ‘a little idea of an ideal career now, but will it actually be like that?’ As change is subjective, she felt it would be valuable to capture the contradictions between clients’ perceptions of the *ideal career versus the reality* of their actual progression and current status.

Finally, despite her lack of concern in using quantitative methods, Joan had an issue with the use of the economic language of consumer and customer to describe the user of the guidance service. The metaphor of a *financial transaction* was used in her argument that ‘you are not coming to buy something’ when you seek guidance. Applying the analogy of her young pupils in school as customers in education she found the language ‘a little bit sharp or cold’. It did not marry with the ethos of education or guidance as it is *incompatible with the personal development* of the user. She felt client is more appropriate as it is broadly used in many helping and therapeutic disciplines.

### ***Katherine (Case 2)***

Katherine’s narrative demonstrates a mainly *opportunistic* approach to her education. This is a consequence of family priorities taking precedence over the pursuit of learning. As is the situation with many older returnees to education, Katherine had missed out on the opportunity to go to college when she finished High School in the USA. She had married young and moved to Ireland to raise her family. In 2001 she seized the opportunity to do something about her ‘long-held dream’ when she saw the sign for REGSA and said to herself ‘Right, go in’.

Katherine’s education experiences are an example of *non-linear progression* and *retrospective progression*. An examination of her progression path highlighted a pattern

of starting and stopping education over a period of time. This quandary is evidenced in her statement ‘I seem to have gone, ...been all over the place’. However, this non-linear engagement with education demonstrated her tenacity to overcome obstacles and re-configure her situation and needs whenever it was necessary.

Prior to guidance intervention in 2001, she had experimented with a national distance-learning programme (Oscail Diploma in Humanities) in the 1990’s and had already begun to measure her progression from this earlier period. Unfortunately, as she lived in Waterford, she had to drop out of the programme because of the constraints of location (Cork) and timetabling hours which interfered with her family life. Her strategy to deal with this structural obstacle was to *get guidance on local options* best suited to her needs.

Katherine’s subsequent difficulties with subjects on the full-time BA in Accountancy showed her ability to objectively *re-evaluate her options* (intrinsic factor) again. She responded this time by taking the opportunity to *cut back to the part-time* option when it was offered to her. By 2006, she had taken time out again from this course because of *family commitments* (extrinsic factor).

Overall, Katherine’s third-level experiences were both negative and positive. Her attitude to her progression was one of *disappointment* at not *achieving a qualification*. Despite reiterating a number of times in the interview that ‘I actually had no particular goal in mind...this wasn’t going to be a long-term career or anything’ it was clear that achieving a third level qualification was very important to her.

The main negative experience of returning to learning at the age of 53 was that the *leap into third-level was too big* and *emotionally overwhelming* for someone who had not been in full-time education for thirty five years. She vocally described the shock of *juggling* a course workload. ‘Having only done part-time courses in between...all of a sudden I had seven or eight subjects and it was like...Oh my God!’ However, in spite of having to cut

back on her learning, a positive aspect was becoming aware of the *availability of alternative* routes, which means she still has the *motivation to start again*.

Katherines' obstacles were more personal than structural, and the outcomes achieved were more in the form of soft rather than hard. The major structural obstacle to her progression has been the intransigency of HE institutions to meet the needs of adult learners like her. In her particular situation this related to the regular movement of programmes to different locations, inflexible timetables, and the lack of a modular learning facility on full-time day programmes.

In terms of personal obstacles, Katherine's *family commitments* had been the primary impediment to her progression. A *subject learning block* (mathematics) which she stated she 'just could not get at all...couldn't comprehend' had also hindered her progress. In addition, she had to contend with the *lack of support* and *negative attitudes* of friends who could not understand her desire to learn and thought she was 'absolutely bonkers...going back to school at your age'.

The *issue of age* is a motif in Katherine's narrative. She frequently refers to it and compares herself to the younger students in college. Even though she felt proud that she had 'coped with walking in the gate. Needless to say I was the eldest in the class', she appeared to have certain assumptions about younger students. She believed that they found the transition to much easier than older learners and, therefore, had a distinct advantage over her:

L;       What you are saying is, ah, education, the providers, the provision is not flexible in fulltime for adults, is that what you are saying?

C;       I feel it's not, not for people who have been out of fulltime education. Certainly those who had just completed their Leaving Certificate, it was easy for them to make that step from second level to third level because they were used to being in school all day, ...and would be able to actually time themselves a little bit better I think as far as study was concerned and, am, a lot of them would have done a lot of the subjects for their Leaving Cert..

**Excerpt 19: she believes that younger students find it easier to deal with the transfer into third-level study (*assumption here*)**

See *Appendix M* for further detail in extract 2.

Katherine stated she was *education ready* in 2001 as she had created adequate *space in her life* to pursue a formal qualification. Despite not achieving a higher level *qualification* (hard outcome) she had still gained a qualification, albeit in another discipline (Interior Design). As she did not have a specific goal in mind when she started in third level, it was evident that the *process* of learning was more important to her than the end result. She prioritised *personal achievement* (soft outcome) over a *long-term career outcome*. Other soft outcomes were *new friendships* made with fellow students, *personal satisfaction* that she had ‘made the attempt’, and an *open-mindedness* to the opportunities available through any type of learning.

In Katherine’s view, longitudinal tracking is a valuable process. She saw it as a tool to *gather information* on the experiences of clients and provide a *reminder of support available*. This information could serve as a form of *case study* or learning tool to showcase the variances in clients’ experiences. It would be important, therefore, she stated, to find out *the end result* for clients and to establish their *decision follow-through* after guidance intervention.

Katherine’s outlook on outcome measurement was that both hard and soft outcomes should be evaluated, but her arguments were somewhat contradictory. In terms of hard outcomes, she said it would be important to try to measure the outcomes of the *client’s expectations versus the reality*, for example, course start/completion. She felt that the priority of services should be to track education outputs, as in qualifications only, in relation to employment outputs.

By giving a greater *importance to qualifications*, Katherine devalued her own learning experience, arguing that unless there was a ‘category for *personal satisfaction*’ she could not see the significance of tracking her long-term progression. When pressed further on this issue, she stated questions should address clients’ personal development (*decision-making* and *personal learning experiences*), and provide a feedback forum for *structural*

*improvements* that would encourage adult learners to engage in education and progress further.

For Katherine, as guidance is on a *personal one-to-one basis*, she ‘would prefer to be referred to as a *client* rather than a customer or consumer’. She also employed the analogy of a *financial transaction* (‘buying a lollipop’) to argue against the use of economic language in conjunction with a ‘free service’. This terminology related to the ‘masses’ and is incompatible with being ‘treated as an individual’ in guidance.

### ***James (Case 3)***

In Case 3, James’s narrative shows a *strategic* approach to his education and career decisions. His progression is characterised by a rational and realistic decision-making style based on the realities of his life situation. By accepting that a phase of his working life had come to an end he had been forced to weigh up his options and find a particular solution to the problem. Similar to other rehabilitating adults who had come for guidance, James did not want to fall out of the conventional workforce as he felt he still had a valuable contribution to make, but in another area (Information Technology).

James’s progression can be defined as both *cyclical* and *linear*. As his education in IT had begun much earlier with an Oscail programme, it can also be viewed as *retrospective*. He did not complete the programme as he had found it *impossible to juggle* both full-time work and part-time study. After the accident his introduction to the subject proved valuable when he realised he would have to upskill and adapt to a new career area. He then strategically availed of a VTOS programme to ‘gauge’ his learning ability.

In light of the cognitive challenges brought about by his accident, and the subsequent obstacles he had to face, James had been determined and focused. Even though his progression had been linear, in his movement from Level 5 to Level 8, it had also been cyclical. At one point he was forced to defer because of *family priorities* (extrinsic factor)

but his inherent *ability to adapt* (intrinsic factor) to changes had helped him fit back in following the year out.

James was extremely happy with his progression as it had *exceeded his expectations*. He described it in terms of a distance metaphor:

Considering where I am coming from at the outset... I had to learn everything again from scratch basically ten years ago.... I never thought that I was going to get the Cert actually.

Despite the challenges of the BSc, a positive aspect of his progression was his *stickability* to keep on track. However, future employment posed new challenges for him. He used the metaphor of being *in a limbo-land* to describe how he was ‘employed but unemployed, I have been permanently....they reckon I will never work again....’

The only structural obstacle that James had to deal with was being a *solo learner* on the Higher Certificate due to student attrition on the course. Rather than seeking a transfer to another course he ‘lasted the two years...saw it through, toughed it out’. Personal obstacles included overcoming a *gap in learning* and coping with *new subjects*. He felt his *age was a stumbling block* when confronted with a new subject, such as mathematics, for the first time after thirty-five years out of full-time education. His response was *creativity* and *self-direction*. He excitedly explained how he developed new techniques called to retain information:

L;        Okay, so how do you feel about your progress to date then in relation to your education, in relation to maybe achievements and difficulties that you have experienced as well?  
F;        Well, I think it's, I am doing well given the fact that I am not supposed to be able to retain information for a start.

**Excerpt 17: happy with this progress so far despite his disability**

L;        Okay.  
F;        Now I know that we all have our moments and that we forget things and sometimes I do, it just requires more concentration. ..the way that I get around it is, I am after getting very good at developing, ‘work arounds’ is what I call them, and what I think is great is ahm, what do you call them, mind maps..

See *Appendix M* for further detail in extract 3.

James had been tactical in his career decision-making. All along the goal had been to enhance his *career mobility* through further and higher education. Even though there was still a *sense of uncertainty* about the future he had already achieved a Higher Certificate (hard outcome). He believed a higher qualification was the route to a *total career change*. Ultimately, his long-term goal was to ‘come up with a good idea’ and become *self-employed*.

A number of personal (soft) outcomes were also identified by James. They were the *ability to learn quickly*, a capacity to *think outside the box* and the skill of *adaptability*. In this instance, James compared himself to the ‘youngsters’ in the class who got ‘panicky’ when problems were not straightforward and solvable. Rather than viewing the age difference negatively, his open-minded approach allowed him to continuously adapt.

At the time of guidance James was definitely *education ready* as he had already begun the journey in VTOS. He gave a number of reasons why the *time was right* for him to re-enter education. Firstly, it prevented him from getting lazy and totally giving up on a new career. Secondly, his two children were nearly finished in third level, and thirdly, it was financially viable because he had state-funded support (long-term disability). However, James felt strongly that ‘education is not something that you can make someone do’, being ready for education is very much an individual decision.

Unsurprisingly, given his IT background, James took a scientific approach to the issue of longitudinal tracking. He was *amenable* to it as ‘it gives an accurate feedback’ and is a means of keeping ‘in contact with the people [clients] who are in the system’. This was viewed as a *reciprocal process* between the service and the client. For him, the purpose of tracking was to *gather accurate information* and serve as a *mechanism of intervention* for those who ‘start falling behind’ by reminding them that there is *help available* if they need it again.

However, in terms of methodology, James put forward the argument that quantitative methods (questionnaires) can be *biased* as they may contain inferences in the form of predetermined categories. This makes the method ‘narrow’ or *inflexible* as it does not account for the *variances of meaning* people can ascribe to evaluative questions. He used the analogy of hiring people in industry in order to illustrate how one’s overall life experience is important in the evaluation of outcomes. In particular, he said he would like to be asked about his *future goals and achievements* in terms of employment.

Finally, James did not have a strong opinion about the language employed by evaluators to describe users of the service. He stated ‘if I had a preference, I imagine I’d prefer to be called a consumer’. He associated consumer with the user of a particular product, whereas customer implied a financial transaction that is incompatible with ‘a free service’. He argued that as guidance is a free service ‘when I am not paying for something I don’t think that the term customer should be applied’.

#### ***Owen (Case 4)***

Owen’s career narrative demonstrates a *circumspect* style of career decision-making. When he realised that farming no longer offered a sustainable livelihood he had to wrestle with the implications of a career change for both himself and those closest to him. He was, therefore, cautious in his pursuit of a new career route (chartered accountancy) and had taken the process one step at a time. This prudence was evident in his long-term goal to keep a foot in both camps (farming and accountancy) which was stimulated both by the desire to hold on to his heritage and to deal with the reality of creating a new source of income.

Owen’s progression experience had been *linear* since the time he re-entered education to study for the part-time IATI programme. A positive aspect of his progression was the *smoothness in transition* from part-time learning to working for a new employer and preparing for his professional exams. This was a result of the *judicious approach* (intrinsic factor) he had taken in his preparation to return to education, as evidenced in:

I wanted to be able to commit myself to it fairly because when I started education, it was going to be a change for me.

However, the negative aspect of this transition, and a regular motif in Owen's narrative, was his *poor quality of life* from juggling a number of commitments at the one time.

Owen's attitude to his progression was one of *pride* at the *giant leap* he had taken in a relatively short space of time. He equated this in terms of where he had started from initially (early school-leaver) and his current situation (professional status). He found his progress *surprising*:

considering that, say three years ago I was someone that hadn't the Leaving Cert, dropped out of school and now I am studying to be a Chartered Accountant.

Throughout his narrative Owen reiterated his satisfaction at achieving such great strides in his career path despite the gap in his learning.

This *education gap* was one of a number of personal obstacles that Owen had to deal with. Because he was an early school-leaver he had *low self-belief* about his educational ability. This low confidence was fuelled by misconceptions about the importance of having a Leaving Certificate, and its relevance in the selection of a suitable education and/or career path. Like many returning adults who had come to REGSA, Owen believed that not having the qualification would be a 'big drawback' for him. At one point he had considered doing the Leaving Cert before opting for the equivalent Level 5 IATI course.

However, the major personal obstacle Owen had to deal with was his deliberate *disconnection* from the farm and the impact of this change on those closest to him. He found 'leaving the farm, half leaving it was one of the hardest things to do.....and starting the job now'. Downsizing the farm over a period of time had required strategic planning and a total *change of work practice* for him and his family. Despite the realities of their economic situation his parents were not supportive of his idea for a new career (extrinsic factor). This meant he had to slowly 'bring them around to that way of thinking'.

In terms of readiness, Owen explained that being ready had evolved over a period of time for him. This *progressive readiness* is described in terms of stages:

L; So ahm, now the guidance services have to establish whether the clients are ready for education or ready for employment. So, at the time you received guidance do you feel that you were ready for education?

E; At that time?

L; Yes, you know, did you take up some form of education?

E; Mmm, I'd say, at that time, well I probably wasn't ready at that time. I would say a year or two after that...I knew I wasn't going to be ready for a year or two because of the way I was at home...the commitments I had at that time, work commitments. Does that answer your question?

**Excerpt 33: he felt he wasn't ready for education when he got guidance; he had to put plans in place**

E; ...well when I started education, you know, it was going to be a change for me.

See *Appendix M* for further detail in extract 4.

It was only when he had received his IATI qualification (hard outcome) that he felt ready for new employment. Time had also given him *greater clarity of vision* to focus on his ultimate outcome of a *new career* and a *secure future*. At one point he compared himself to 'younger' people who he felt may be changeable in their career decisions, and claimed that the mature 'version probably would have a better idea' of what he/she wanted to do.

Overall, Owen felt that his initial expectations had been exceeded. His long-term goal was to achieve a work-balance between farming and accountancy. Uncertainty about the reality of this is evident in:

I don't know if it's the best thing for me if I follow that. I suppose it's better if I concentrate more on the accountancy...full-time'.

Nevertheless, despite his lack of self-belief at the start of his education journey one of the major outcomes (soft) he had experienced was an *increase in self-confidence*. This was a result of taking on a *new challenge* after ten years of doing the same work and becoming established in a new career. It had required the skill of *adaptability* and a complete *change of lifestyle* on his part. He had also made *new friendships* in work which was in stark contrast to the isolation of farming life.

Owen's response to the question about his amenability to the prospect of longitudinal tracking was a rhetorical one 'would they be bothered?' Nevertheless, he said he would be *agreeable* to tracking every 3-4 years as it was a *reciprocal process* of information sharing between the service and the client. He stated that it would be beneficial to assess the *uptake of education* options after guidance intervention, as well as finding out the reasons for the *lack of progression*. His argument was that clients who do not progress have *legitimate experiences* that need to be captured, 'if people don't take up education, maybe they are more important than the people that do'.

Owen said he would like to be asked about a number of outcomes. They should relate to his *current situation*, his *future goals* and his *personal satisfaction* about 'the way things went' for him. He also queried the current situation whereby, if clients were not ready for education or not ready for employment, would there be a consideration of why they were *not ready* and how could this be measured.

Finally, Owen's opinion on the terms customer or consumer was 'we'll be paying for it next!' He did not like 'debating the words customer or consumer', but was unsure why. Both terms denoted 'an exchange of money'. He compared guidance users to clients of the accountancy firm where he worked. The term *client* was *more appropriate* as it signified the *personal process* involved in the ongoing relationship between the service provider and user.

### ***Derek (Case 5)***

In the final case, Derek's narrative reveals a combination of two styles of career decision-making, *aspirational* and *strategic*. The aspirational style is reflected in his 'lifetime ambition' to return to college despite not having identified a specific career. For years he had conducted an internal dialogue, promising himself 'I'll go back to college...I'll go back to college'. From 2001 to 2005 his decision-making was based primarily on his personal circumstances and *family commitments* (extrinsic factor). By taking a long-term

view, Derek had been *single-minded* (intrinsic factor) in his pursuit of a third level qualification and a financially viable career during this period.

Derek became more strategic in his decisions as he progressed through third level and identified the career area he wanted to pursue. After finishing college in 2005 he had deliberately taken a receptionist job in a men's' hostel, for which he was over-qualified, in order to position himself in the field for future career opportunities. This had paid off, and by 2006 he had both a degree and full-time employment (hard outcomes).

Derek's progression path had been *linear*. He had progressed from Level 5 to Level 8 and straight into employment. His progression was *beyond his expectations* and his family was *extremely proud* of his achievements. After years of low-paid jobs where 'you know you can do better in an area than what you're working at' he felt he had been challenged to *reach his potential*. But he stated the journey had been *arduous*. The *educational leap* from the mature student Foundation course into full-time third level education was 'the hardest thing I ever done in my life was the first day to go into college...and sit in the place'.

In spite of a smooth progression path, Derek had to contend with a series of personal obstacles throughout his studies. The first impediment was a deeply-rooted *lack of self-belief* and *inferiority complex* that stemmed from his early schooling experiences and family background. He described it as an 'intelligence thing' believing that 'only brain boxes went to third level'. Further along he reiterated 'it's my age as well...when I was younger it was only the rich people went to college'. Leaving school before his Leaving Cert had been a deliberate choice based on the financial constraints of his family situation (widowed mother). By going further in education Derek felt he would have stood out from his friends who:

were working and, I didn't want to be the odd one out...they had the money to go wherever they wanted and I wouldn't have.

The *financial issue* was a constant motif throughout Derek's narrative. During his four years in third-level he had to work part-time as he had to support his family. As a consequence, *time management* had been a major problem because he needed to *juggle* so many commitments (work, family, college). He admitted that his *pride* got in the way of asking for help from his family. In order to cope with the college workload he had to resort to *early morning study* between 3 a.m. and 7 a.m. a several times during the week.

In spite of these personal challenges his only learning difficulty throughout the four years had been *sitting exams*. He stated:

I am not a good exam person...and I don't mean I don't achieve the results, it's just the build up to it...and then the postmortems after.

By the end of the fourth year in college he felt he had had enough as it had 'put a strain on me...near the end my tolerance was low'.

Derek used the analogy of Maslow's Hierarchy of Needs to explain how his ultimate goal had been realised. He had achieved a *new career* with *financial security*, and had at the same time found *personal fulfillment* in a job that he cared about. The personal challenge of being 'put in at the deep end' had brought about a *change in attitude* about his age and entitlement to be in college with a younger generation of students. Derek had also acquired a repertoire of new skills that included cognitive, academic, and listening skills.

Derek believed that a combination of *right timing* and *fate* had helped him become ready for education. It had been fortuitous that he had found REGSA when 'it had only been said to me that day...the kids are going to school why don't you go back to education'.

He used the metaphor of a gun to describe the push he had needed:

I really wanted to do it, but deep inside of me I was bluffing...I was going to say about the gun that was put to my head, it's wrong...no, the encouragement I got.

Within a few days of guidance intervention he had secured a last-minute place on the Foundation course and his life had changed dramatically. However, getting ready for

employment was more of a *progressive process* that had evolved during his practical work placements on the BSc.

Derek stated that he was quite happy to receive the tracking survey in 2005, and would be *amenable* to further tracking (every 3 months). He viewed tracking as a *reciprocal process* between the client and the guidance service. In his opinion it was about ‘giving something back to the people who started you initially...it’s very little time to give back...for what I’ve gotten out of it’. He supported the use of quantitative methods but also argued for *case studies* of clients from similar circumstances, for instance, basic education. In particular, case studies could be a *source of encouragement* for mature students and give them ‘that little bit of motivation to keep going’.

In terms of the types of outcomes to be measured, Derek believed that relevance should be given to both *hard and soft outcomes* in longitudinal tracking surveys. The hard outcomes should relate to new qualifications or employment opportunities, for example, promotion, attained over time. Soft outcomes should relate to the client’s *goals, skills* and *personal achievements*.

Derek felt quite strongly about the language used to describe users of the guidance service. He compared it to his own work and argued that in the debate on interventions the *subjectivity* of his clients (homeless) can get lost in the discourse of care professionals. Both the terms ‘consumer’ and ‘customer’ had a *financial connotation* that was *incompatible with the ethos of education*.

M; ...and I don’t know, I would...I think to myself to go into some place and be regarded as a client, be called a client, it’s more important. I mean to me a customer is a person who goes in and buys a pair of shoes, or goes in and gets a pound of butter...or whatever the case may be....and what was the other one you used?

L; Ahm, consumer.

M; Consumer again, I mean...it would go hand in hand with customer. Now I am only saying client, if there is a better word out there at the moment I really don’t know what it is, but I think its client and my clients have no problem, I mean....

**Excerpt 49: he uses the metaphor of a financial transaction for customer/consumer**

See *Appendix M* for further detail in extract 5.

(ii) *Cross-case analysis*

The cross-case analysis concentrates on the range of themes, similarities, differences, and variables across the five cases. The matrix (*Table 8.2*) displays the *pattern codes* which are ranked in order of significance to the cases as they emerged in the textual analysis.

*Table 8.2: Matrix of cross-case analysis*

	<b>C1 Joan</b>	<b>C2 Katherine</b>	<b>C3 James</b>	<b>C4 Owen</b>	<b>C5 Derek</b>
<b>Progression process</b>	<i>delayed</i>	<i>non-linear retrospective</i>	<i>linear cyclical retrospective</i>	<i>linear</i>	<i>linear</i>
<b>Decision-making style</b>	<i>evaluative</i>	<i>opportunistic evaluative</i>	<i>strategic</i>	<i>circumspective</i>	<i>aspirational strategic</i>
<b>Structural obstacles</b>	<i>course postponement</i>	<i>inflexible provision</i>	<i>solo learner</i>	<i>none</i>	<i>none</i>
<b>Personal obstacles</b>	<i>finance other's attitudes tunnel vision age</i>	<i>family priorities education gap subject block juggling other's attitudes age</i>	<i>family priorities education gap subject block age</i>	<i>change of work practice other's attitudes juggling low self-belief education gap age</i>	<i>family priorities finance low self-belief age education gap juggling pride exams</i>
<b>Personal attribute</b>	<i>resilience</i>	<i>tenacity</i>	<i>determination</i>	<i>judicious</i>	<i>single-minded</i>
<b>Hard outcomes</b>	<i>none</i>	<i>qualification</i>	<i>qualification</i>	<i>qualification new career</i>	<i>qualification new career</i>
<b>Soft outcomes</b>	<i>self-confidence think outside box coping skills clarity of vision</i>	<i>personal achievement new friendships openness to learning</i>	<i>think outside box adaptability openness to learning</i>	<i>self-confidence personal achievement clarity of vision adaptability new friendships</i>	<i>personal fulfillment financial security skills openness to learning</i>
<b>Client readiness</b>	<i>not ready client's decision</i>	<i>right time</i>	<i>right time client's decision</i>	<i>not ready</i>	<i>right time</i>
<b>Rationale for tracking</b>	<i>legitimacy of experience reminder of help track journey spectrum of opportunities</i>	<i>gather information reminder of help decision process case study structural improvement</i>	<i>reciprocal process gather information feedback mechanism reminder of help</i>	<i>legitimacy of experience reciprocal process understanding of non-progression</i>	<i>reciprocal process case study source of encouragement</i>
<b>Outcomes for measurement</b>	<i>ideal vs. reality hard &amp; soft choices personal satisfaction</i>	<i>expectations vs. reality hard &amp; soft personal satisfaction</i>	<i>hard &amp; soft goals achievements employment</i>	<i>hard &amp; soft current status course uptake goals personal satisfaction</i>	<i>hard &amp; soft goals skills personal achievements</i>
<b>Language used</b>	<i>implies financial transaction incompatibility</i>	<i>implies financial transaction incompatibility</i>	<i>implies financial transaction incompatibility</i>	<i>implies financial transaction incompatibility</i>	<i>implies financial transaction incompatibility</i>
<b>Term</b>	<i>client</i>	<i>client</i>	<i>consumer</i>	<i>client</i>	<i>client</i>

The comparative analysis of the five clients shows that their progression histories contain both similarities and differences in experience. Specifically, it demonstrates how the three male clients' progression paths were *linear* and more advanced in terms of education and employment attainment. In comparison, the two female clients' progression had been hampered by a structural obstacle (Joan) and a combination of structural and personal obstacles (Katherine).

Nevertheless, James did experience both a structural obstacle (solo-learning) and personal obstacle (family) but he still managed to stay on track with his studies. Similarly, Owen and Derek had experienced a number of personal obstacles (self-esteem, juggling) but they too had stayed on track. For two of the clients, Katherine and James, their progression was also *retrospective* as they had begun their education journey prior to guidance and had measured their progress from that earlier period.

Even though all of the clients had to appraise their options at various points in their career trajectories, both Joan and Katherine were forced to *re-evaluate* their situations on a more regular basis. However, in comparison to Joan, Katherine was more *opportunistic* in her approach as family commitments always influenced her decisions. Katherine was also the only client who had returned to education to fulfill a personal goal rather than a career goal.

In contrast, the three male clients demonstrated a more *strategic approach* in their career decision-making. They had all identified that a qualification was the route to a new career for them. Both James and Derek had opted for a third level qualification, whereas Owen had *circumspectively* chosen part-time further education and professional training. At the outset, Derek had been *aspirational* about his future career but became more focused and strategic as he progressed.

A key similarity across the five cases was their positive outlook and their ability to keep motivated despite the set-backs and difficulties they had experienced. Each, in turn,

demonstrated levels of *resilience* in their career decision-making and response to barriers en-route. In Joan's, Katherine's and James's stories structural and personal obstacles could have discouraged them but they were still motivated to continue with education. Likewise with both Owen and Derek whose single-minded approach helped them to overcome low self-esteem about their education ability in the pursuit of a new career.

Joan, Katherine and James had encountered different types of structural obstacles and responded in their own way. In Joan's situation, as events were outside of her control, she had no choice but to wait until they improved. Katherine resorted to choosing options that were best suited to her personal needs and family circumstances. As a solo-learner, James 'toughed it out' and viewed his position as an advantageous one for two years. As Owen and Derek did not encounter any structural obstacles their education progression had been smoother, but more personally challenging.

In terms of personal obstacles a number of themes emerged. The most significant theme across the five cases was the *age* issue. Katherine, James, Owen and Derek all linked their age with their *education gap* and subsequent learning experiences. Owen and Derek had *low self-belief* about their ability to learn prior to education, and even though Katherine and James did not express this as an issue, they did have to cope with specific subject blocks in college. In addition, all four compared their learning and career decisions to younger people at some point in their narratives. The issue of age was slightly different for Joan as it was related to the feeling of time slipping away and no apparent progress being made by her.

Even though *finance* was a major issue for both Joan and Derek, it was of less concern for James and Owen. Katherine did not mention it as an obstacle at all. For the three older clients, Katherine, James and Derek, *family priorities* had always taken precedence and influenced their return to education at certain points in their lives. This was less of a factor for the two younger clients who were both single. Joan did not refer to this as an issue. Owen, however, did have certain family commitments that were effected by his

change of work practice. Continuous *juggling* was a problem for three of the five clients. Being a single parent, Katherine had to juggle family and study. As Owen and Derek had to juggle work and study, *time management* and *poor quality of life* were major concerns for them.

Three clients also had to contend with personal barriers in the form of *negative attitudes* from colleagues, friends and family. Lack of support had affected Joan's self-concept for a period of time, Kathleen had consistently challenged it and Owen slowly brought family members around to his way of thinking. Personal barriers had hampered Joan's (*tunnel-vision*) and Derek's (*pride*) progression to varying degrees.

At the time of guidance the three older clients were more ready for education than the two younger clients. It would appear that, having waited so long for the opportunity, Kathleen, James and Derek were more open to taking immediate risks. In comparison, Joan and Owen needed more time to become *psychologically ready* to leave their comfort zones. Owen and Derek described getting ready for employment as a *progressive readiness*. However, Joan and James argued that determining readiness was the *client's responsibility* and not other peoples. The theme of *fate* also emerged with regard to readiness in three cases. Joan, Katherine and Derek believed that chance had played a part in their finding guidance when they did.

Four of the five clients had achieved *hard outcomes*. Both Katherine and James had acquired qualifications enroute, whilst Owen and Derek had professional qualifications and were already started in their respective careers. Nevertheless, all five clients had experienced a wide range of intangible or softer outcomes that can be encapsulated under the major theme of *personal development*.

A soft outcome for three clients (Katherine, Owen and Derek) was the sense of *personal achievement* gained from their education experiences. The two younger clients, Joan and Owen, had experienced greater levels of personal growth displayed in their *self-*

*confidence* and *clarity of vision*. The three older clients had acquired an *open-mindedness to learning*. On a practical level, *new friendships* in college and work had been personal outcomes for Katherine and Owen. Derek had a new career that promised a more *financially secure future*, and Owen had experienced a *lifestyle change* that was far removed from the isolation of farming.

*Skills acquisition* was also a major soft outcome for four clients. Both Joan and James had developed their cognitive skills and were able to *think outside the box* when faced with challenges. Joan had also experienced better *coping skills*. Owen and James had become more *adaptable* in work and learning situations. James had also developed *creativity skills* for dealing with learning blocks. Derek now possessed a number of *academic* and *work related skills*. Despite her learning experiences, Kathleen did not mention any particular skills in her narrative.

There was a consensus amongst the five clients that client tracking is a beneficial process. The three male clients viewed it as a *reciprocal process* between the user and the guidance service. The two female clients felt it was important to *track the journey* and learn about the *spectrum of opportunities available* and find out where clients ‘ended up’. Joan, Katherine and James felt that a tracking mechanism would serve to remind people in the ‘guidance system’ that help was available if needed.

As an information source, Katherine and James argued that the mechanism could provide *feedback* to services and influence *structural improvements*. Information in the form of *case studies* was proposed by Katherine and Derek. More specifically, Derek argued case studies of clients who had progressed through the education system would encourage other adult learners from similar backgrounds.

Finally, the two younger clients argued that tracking would serve to *legitimise the client’s experiences* for two different reasons. Joan felt it was important that the service took an

interest in her progress. Owen, on the other hand, believed that clients who do not progress should not be overlooked as their stories are equally important.

All five clients advocated the measurement of both *hard and soft outcomes* in tracking systems. The main hard outcomes of education qualifications and employment were proposed. There was a variation in the range of soft outcomes across the five cases. All five clients felt that *personal satisfaction or achievements* were highly relevant. The two female clients stressed the importance of measuring the intangible concept of one's *prior expectations versus the reality* of one's current situation and the *choices and decisions* involved. In contrast, the three male clients focused on the more concrete concepts of *future goals* and *skills* attained.

Finally, four of the five clients preferred to be identified as 'client', rather than a 'customer' or 'consumer' which were synonymous with a *financial transaction*. In contrast, James favoured the term 'consumer' as it signified a user of a particular product such as guidance.

### *(iii) Summary of findings from individual interviews*

In order to discuss the major themes that emerged in the textual analysis of the client narratives the findings are summarised into four sub-headings: (a) defining progression; (b) client readiness; (c) outcome measurement; and (d) client tracking systems.

#### *(a) Defining Progression*

A concise definition of individual progression was extremely difficult to reach as it was a complex, subjective and context specific experience for each of the five clients. The findings explicated that progression meant something different to each client. Lack of progression for two clients meant 'frustration' and 'disappointment'. For three other clients forward progression was a combination of 'surprise' and 'beyond expectations'.

It emerged that the progression process involved a continuous forward and backward movement influenced by a range of psychological (intrinsic) and social (extrinsic) factors. The process contained a myriad of variables including self-concept, decision-making, motivation, personal attributes, expectations, goals, structural and personal obstacles, and support systems. In addition, the clients' historical situations influenced their progression as some of them had long-held aspirations to return to education for reasons of personal achievement, rehabilitation or economic and social mobility.

Progression as a phenomenon contained a number of concrete and abstract elements. The concrete elements related to types of progression and the tangible (hard) outcomes achieved, whereas the abstract elements were the range of intangible (soft) outcomes which are much more difficult to measure. The outcomes are discussed in detail in (c).

A major theme in the narratives was the variabilities in the types of progression experiences. Some clients achieved a smoother linear progression than others, particularly if they had not met with insurmountable obstacles. In one instance progression was cyclical for a client who needed time out from a course of study and returned at a later stage.

The concept of "retrospective progression" also emerged as two older clients had begun their return to education prior to guidance in 2001. As a consequence, their construction of personal progression was influenced by their historical experiences of education from an earlier point in time. Retrospective measurement was also used by two early-school leavers who viewed their progress in terms of milestones achieved over a long period of time.

The primary factor that impacted on the clients' progression was the diverse range of obstacles encountered en-route. The most influential factor in the navigation of these obstacles was the clients' decision-making style and attitude. The three male clients who adopted a more strategic style appeared to progress quicker than the two female clients

who were more evaluative and/or opportunistic in their approach. It is important to note that some structural obstacles were outside the client's control at the time (C1). Furthermore, family priorities took precedence over education for a separated parent and main caregiver (C2).

Table 8.3 provides a causal chain model to demonstrate a cause and effect linkage of client progression post guidance intervention (Miles & Huberman, 1994:222). The chain attends to the most significant obstacles and effects in each of the client cases.

*Table 8.3: Causal chain model of client's progression paths*

	<b>Start of Progression</b>	<b>Cause</b>	<b>Effect</b>	<b>Cause</b>	<b>Effect</b>	<b>Progression status: 2006</b>
<b>C1</b>	college application →	obstacle (st) → <i>postponement</i>	evaluate options →	obstacle (per) → <i>finances</i>	subbing work →	<i>delayed progress</i>
<b>C2</b>	enters college →	obstacle (st) → <i>workload</i>	evaluate options →	obstacle (per) → <i>family first</i>	suspend learning →	<i>lack of progress</i>
<b>C3</b>	enters college →	obstacle (st) → <i>attrition rates</i>	solo-learning →	obstacle (per) → <i>family crisis</i>	defer year →	<i>return/qualify</i>
<b>C4</b>	starts part-time education →	obstacle (per) → <i>workload</i>	down-size business →	obstacle (per) → <i>parents</i>	change their views →	<i>qualify &amp; work</i>
<b>C5</b>	enters college →	obstacle (per) → <i>education gap</i>	low self-esteem →	obstacle (per) → <i>finances</i>	juggling →	<i>qualify &amp; work</i>

As all five clients displayed attributes of persistence, determination, and single-mindedness the concept of career resilience was a significant theme in their personal narratives. The obstacles that impacted on their progression were both structural and personal. Specific structural obstacles included course deferment, regular movement of course location, rigid timetabling, inflexible learning options such as full-time only and course attrition.

However, personal obstacles were the greater issue for the clients and a number of significant themes emerged. The major theme was the issue of age. Developmentally, the younger clients were concerned with the time it took to carve out a new career;

whereas the older clients were concerned with their gap in learning. The issue of overcoming an education gap was another important theme as some of the clients tried to manage deficits in their learning, and cope with low self-esteem and a lack of confidence in their ability.

Juggling a number of commitments, including family demands, was a major concern for four clients. Family priorities created obstacles to learning, especially for the primary caregivers who needed to balance varying degrees of study, paid employment and home-life. This was often a result of financial constraints. Two clients, in particular, had to support themselves and/or family throughout their full-time studies (C1 and C5).

Finally, the theme of personal support was evident as all the clients had to draw on both internal and external support systems at some point in their progression. Quite often the clients had to deal with their own self-esteem issues and/or deal with the negative perceptions of the people closest to them. Specifically, one client experienced an emotional block in the form of depression which hampered clear thinking (C1), and pride stopped another client from seeking support when he needed it most (C5).

#### (b) Client Readiness

The clients' experiences varied with regard to their 'readiness' for education and/or employment. The concept of "progressive readiness" emerged in relation to the psychological and behavioural preparation needed by three of the clients. The two younger clients had to slowly detach themselves from their secure working environments and get organised for the imminent changes that education would bring. An older client (C5) needed time to identify options for new employment during his third level education. Importantly, determining readiness in evaluating progression was viewed as the client's responsibility as opposed to the guidance practitioners.

Finally, the concept of "happenstance" also emerged in relation to the process of readiness. Three clients coincidentally found guidance when the time was right for them

to make changes in their lives. In this respect, guidance was viewed as a significant catalyst of change at a particular point in time in the clients' career development. All three clients felt they were pointed in the right direction after years of grappling with the need to make personal changes.

### (c) Outcome Measurement

There was a general consensus amongst the five clients that the consideration of a wide range of outcomes is necessary for a satisfactory measurement of client progression. They believed that tracking systems should attempt to encompass both hard (tangible) and soft (intangible) outcomes. Hard outcomes should include education uptake, qualifications, employment attainment and career change. Soft outcomes ought to reflect the personal development of the client from three perspectives: psychological, behavioural and social.

From a psychological perspective the personal growth of the client includes factors such as identity, confidence, self-esteem, attitude, motivation, personal satisfaction and achievement of potential. Behaviourally, personal growth refers to a change in options and personal circumstances for the client. It can involve skills acquisition (career management), goals, lifestyle change, employment, promotion and improved status (financial security). At a social level, personal growth can involve new friendships, changed work environments and community engagement.

In addition, skills and goals need to be considered in the measurement of outcomes as they are essential to the individual's education and career development over time. Skills straddle both hard (technical, practical) and soft (cognitive, emotional) skills. Soft skills include decision-making, coping, problem-solving, creativity, adaptability, and flexibility. As personal and professional goals are liable to change over time, and be influenced by intrinsic and extrinsic factors (confidence, family, economy), they can significantly impact on the individual's long-term progression.

#### (d) Client Tracking Systems

All five clients were agreeable to longitudinal tracking at some level. It was viewed as a “reciprocal process” that offered benefits to the guidance service and the user for a number of reasons. A major reason was the legitimisation of clients’ progression experiences through a system of regular tracking and evaluation. The process could also provide insight into the reasons for non-progression and the possible interventions needed to support adult learners.

It could also serve as a “stimulus mechanism” to remind clients of the availability of help if they need to re-engage with the guidance service. As an information source, tracking could highlight the spectrum of opportunities open to clients, gauge the types of outcomes achieved and provide feedback for structural improvements at the level of the guidance service and/or the education provider. In particular, client case studies were proposed as models of progression to encourage adults in their education and career paths.

A general consensus emerged amongst the five clients on the current language adopted by evaluators to identify users of guidance services. The majority argued that the terminology represents an economic model that is unsuited to the helping model of guidance. Both the terms ‘customer’ and ‘consumer’ signify an economic discourse that is incompatible with the ethos of guidance in its support of the individual’s personal educational and career development. The term ‘client’ was deemed to be more appropriate as it relates to the personal process involved and the individual relationship between the guidance practitioner and the service user.

#### *8.1.2 Practitioner focus group interviews*

Content analysis was used to manually analyse the qualitative data gathered from the forty-two focus group questionnaires. This involved coding units of text, words and phrases, into categories that allowed for the emergence of specific themes (Cohen et al, 2007:476). The codes are descriptive and capture the perceptions of the guidance

practitioners (p.478). However, a limitation found in the data analysis was that some guidance systems and procedures were alluded to but not always made specific by the respondents in the questionnaire.

A number of key issues emerged in the data analysis of the practitioners' discourse. The issues relate to the definition, measurement and longitudinal tracking of client progression in practice. A conceptual framework of the concept of 'progression' was created from the data gathered from Question 1. This conceptual map is available in *Appendix O*. The themes displayed in the conceptual framework (re Q1) and the findings from Questions 2 and 3 will be discussed individually before the overall findings are summarised.

*(i) Findings from the focus group questionnaire*

The findings from Question 1: "*What is your definition of progression for clients?*", indicated that even though an exact definition of progression could not be established, the concept of progression can be addressed through three specific themes: (a) personal development (soft outcomes); (b) achievements and attainments (hard outcomes); and (c) process. *See Appendix O* for conceptual map of themes.

**(a) Personal Development (Soft Outcomes)**

The most prominent theme that emerged in the findings was that progression can be viewed in terms of the long-term personal development or intangible outcomes (soft) experienced by the client. Personal development for the client can be *psychological, behavioural* and *social*.

The *psychological* dimension refers to the client's self-concept, which is how he/she feels about his/her progression and how he/she views the future in terms of learning and career development. This entails improvement in self-awareness, self-confidence and learning, informed decision-making and a greater sense of agency in relation to abilities and options. One practitioner stated that the client 'has a greater sense of agency – they

believe they can change their circumstances and they have a greater understanding of the way forward'. This can involve the client's 'awareness of opportunity structure' to help with progression.

The *behavioural* dimension of personal development refers to any movement or change experienced by the client. This can be viewed in terms of goals achieved, expectations met, ambitions realised or a specific destination reached. Movement, implying action, can entail a shift or change in the client's personal circumstances and/or perspective. This movement or change can be large or small. For example, it might involve progression from one professional stage to the next in the client's career. Alternatively, it can also be something as minute as the 'first step' which leads to a shift in the client's attitude or perspective about his/her situation. Either way this movement was described by one personal adviser as 'making a move in the right direction that has a positive impact on the client's life'.

Movement was also described by one practitioner in terms of stages in 'moving a client from A to B'. Another practitioner stated that behavioural change may also involve recognition by the client 'that moving sideways rather than forward is appropriate'. Ultimately, any changes experienced by clients are relative to their individual needs and aspirations at the point of accessing guidance, and progression may mean that 'they are in a better place than when they first arrived for help'.

A client's personal development can also be defined in *social* terms. This can include improved social skills and 'increased involvement in their community/family lives'. This type of progression for clients can encompass better self-management skills in the wider social context, development of new friendships and actively contributing to their wider community.

(b) Achievements and Attainments (Hard Outcomes)

The second theme that emerged was that progression can also be defined in terms of the achievements and/or attainments of clients. These more tangible outcomes (hard) refer specifically to achievements in education, training and employment, such as ‘got a job/got on a course they wanted’. In educational terms, hard outcomes are attainments in education and training whether they are ‘accredited or not’. One practitioner explained that progression is ‘defined by my institution as going on to the next course at the next level’.

In employment terms, outcomes can include job placement, new job role, self-employment, career change or active retirement. For one practitioner this involved ‘obtaining and sustaining’ employment, whereas another practitioner stated this may be defined as ‘even getting people to turn up for an interview’.

(c) Process

Lastly, some practitioners also described progression as a ‘process’ both in terms of guidance support and the experiences of the client. From a practice perspective, the concept of progression is viewed as a sequence of guidance-related interventions that enable the client to progress. As one practitioner explained while progression may ‘not always be tangible in terms of outcomes, it is person-centred around what the learner sees as progression’. The practitioners viewed their role in the process as ‘enabling and empowering’ clients to convert ‘ideas into actions’ and ‘giving them the motivation to make an informed decision’.

Finally, from the client’s perspective it may be a transformation from the unspoken into the spoken, described as ‘discovering a possibility through a process of transforming thoughts into utterances’. This process is facilitated by a sensitive practitioner willing to ‘create appropriate space to explore possibilities’.

The findings from Question 2: “*Is it [progression] the same as ‘stakeholders’ in your organisation (i.e. your employers, funders, policy-makers)?*” were both quantitative and qualitative. The findings indicated that there was a major disparity between the practitioners’ definition of progression and that of their stakeholders (employers, funders, policy-makers). Overall, quantitatively, 69% of the participants responded that their definition of progression was not the same as stakeholders in their organisation. The dominant view was that the measurement of progression is defined by stakeholders in terms of ‘hard outcomes’ that are primarily ‘target driven’ by government policy, funding provision and economic goals.

Qualitative responses included:

stakeholders expect an outcome or hard data to measure progression;

outcomes are required to be tangible and linear which are related to learning goals, retention rates, achieved qualifications or employment;

they are target driven by contracts and funding can be dependent on progression into course starts.

One practitioner stated:

government policy is often a million miles from answer to Q.1 – often perceived to be more to do with measurable economic benefits.

17% of the participants responded that their definition of progression was the same as the stakeholders in their organisation. The positive responses varied somewhat. Some stakeholders defined progression in terms of an improvement in the client’s personal circumstances be it education, skills, confidence levels or entry into employment. One particular research organisation had been able to secure funding to investigate this phenomenon further.

However, one practitioner explained that client progression is ‘confined by requirements of *nextstep* contract (and others) and ALI requirements’. Target driven outcomes raised a particular concern for one IAG worker who states that ‘the learners receive little continued support once the target is achieved and the funding closed down’.

5% of the participants responded *Yes & No* to this question which indicated that this is not a clear-cut issue. One practitioner explained that ‘it can be dependent on the sector, type of funder or partner organisation’. Another practitioner stated that ‘it can be a compromise between what the organisation believes and what it can achieve’.

Finally, 9.5% of the participants did not give a *Yes* or *No* response, but provided some explanations. One guidance advisor stated:

This issue is being addressed by local research and logging of soft outcomes, but specific funding initiatives require progressions that are purely target driven, i.e. qualification outcomes.

Another practitioner stated that ‘on occasion there can be a meeting when they are the same but will also be different depending on funding’. A careers adviser was concerned that the FE provider ‘wants clients on their courses which may not be the best progression route for clients’.

The findings of Question 3: “*To what extent do you think clients’ progression is being measured adequately in adult guidance?*” also varied greatly. The findings were indicative of the tracking systems in place (or not in place) in the practitioner’s organisations and their own views on measuring progression. The findings are divided into two dimensions: (a) extent, and (b) regularity of tracking.

(a) Extent

Approximately 45% of the practitioners expressed the opinion that there was an inadequate measurement of client progression in adult guidance. They stated that it can be inaccurate and unsatisfactory and ‘dependent on accessibility, willingness of clients to respond, time, money and resources’. However, one practitioner stated that the requirement of clients to complete proformas ‘gets in the way of guidance’.

Another guidance advisor stated:

it’s fine – but government won’t like it. Well, there is no definite standard and thus progression is being monitored through client’s individual action plans in order to enable the client to identify their need to progress and their route, that may even be - do nothing.

There was also a consensus amongst some practitioners that measurement is ‘primarily for the benefit of funders, not clients’ needs or service delivery (i.e. a quality service)’. One career guidance team manager stated that progression measurement is ‘not effective or consistent, lots of different things to be measured, approaches vary across the spectrum’. An adult literacy practitioner remarked that:

it depends on who is looking at the information – for us as practitioners it can be good in terms of anecdotal information regarding soft outcomes. For funders the information may not be regarded as adequate in relation to Q.1.

Finally, quite a number of practitioners stated that soft outcomes were not being measured adequately by stakeholders. For example, one practitioner remarked that ‘the concept of *distance travelled* is relevant and often not taken into account by policy makers’. An employment link officer believed that a client’s wellbeing also needs to be measured stating ‘people regain place in society, come off benefits, move location to a better area’.

#### (b) Regularity of Client Tracking

It was found that client tracking is taking place in the adult guidance sector in the four countries. However, the frequency of tracking varied across the sector. For example, one guidance development co-ordinator stated that the ‘process is in its infancy but growing fast and possibly developing in different ways in different places’. Even though tracking was occurring at a number of different levels, it was becoming part of the political agenda for quality assurance through the Adult Learning Inspectorate (ALI).

Some respondents provided examples of specific activities in their sector:

- a) A career development executive stated that his/her organisation is beginning to put in place research needed to manage longitudinal tracking, as in a national client data management system. He/she stressed that it required more effective partnership making and management across and within sectors.

Currently 10% of clients are followed-up annually but ‘I’m not sure we’re asking the right questions’.

b) Some services were conducting six monthly+ tracking but there was a view that progression was not being measured adequately. An Advice Services Director stated ‘the simple tracking of course starts meets funder’s needs but tells us nothing about which services/approaches to service delivery are most conducive to progression as defined in Q.1’.

c) With regards to the tracking activities of *nextstep*, ‘the ALI is now pushing the agenda and there is a movement from 20% tracking profile to 100% tracking profile’. However, even though one *nextstep* Adviser stated that progression is not measured adequately, another *nextstep* Adviser offered that he/she is involved in ‘some measurement via *nextstep* – mostly quantitative but now collecting some case studies’.

d) Careers Wales was using a formal impact measurement system at three, six and nine monthly intervals on a large cohort of clients. Permission was sought from the client for tracking during the guidance interview. Longer term contact was being considered by the organisation to track long-term progression.

e) Tracking was also being used by some adult guidance providers via Learn Direct.

f) One educational adviser stated that progression is measured ‘academically but not through guidance channels’ in his/her HE organisation.

Concerning timescales and client contact, some organisations were tracking every three to six months but there was little evidence from the data to suggest that long-term tracking (post 1 year) was taking place. One practitioner stated ‘timescales for clients

reaching goals can be anything from one to ten years possibly'. Another practitioner highlighted the issue of service cross-over remarking that it 'can be difficult to keep in touch with clients if they move from one service provider to another'.

(ii) *Summary of focus group findings*

The conclusions drawn from the focus group questionnaires were that there was a divergence between the requirements of the stakeholders, that is, employers, funders, policy-makers, the values of the guidance practitioners and the needs of the client. In terms of reaching a clear definition of progression the issue was less straightforward. The difficulty of defining progression was summarised by one community guidance worker:

it is very difficult to measure *true* progression as it is often in unquantifiable area/aspects of their life – personal or social and may be prescribed by the client.

The intangible nature of progression was described by another guidance practitioner as:

anything that the client perceives as making a difference to them – personal fulfillment irrespective of whether it is academic/work related or not.

The guidance practitioners argued that obtaining a true measurement of progression was extremely difficult because of the multi-faceted and subjective nature of clients' individual experiences. Individual progression was represented in their discourse primarily as the personal development of the client. This involved clients' psychological, behavioural and social growth which could bring about a positive change in their personal circumstances. Their personal development encompassed both soft and hard outcomes. The harder outcomes were related to education and employment attainment. In addition, progression was viewed as a process of intervention that empowered clients to become agents of change in their lives.

As regards the measurement of outcomes, the findings revealed that the vast majority of stakeholders in the practitioners' organisations measured progression in terms of the 'hard outcomes' of education and employment goals. Such outcomes were often prescriptive and defined by guidance providers and funders as predetermined targets that

needed to be met, sooner rather than later. However, as one practitioner argued ‘clients’ goals can change over time’ and minimal attention is being given to the soft outcomes ‘unless they are specific to policy or funding requirements’.

Furthermore, it was evident that there was a conflict between the person-centred approach of the guidance practitioner and the requirements of some stakeholders who measured progression in terms of client numbers. Pressure was being placed on guidance practitioners and/or service providers to ‘move clients on’ to satisfy hard targets required by their organisation. This appeared to be directly related to the sourcing and maintaining of funding or the renewing of service contracts which are dependent on quantifiable results.

Finally, it was found that client tracking was being used for evaluation purposes in some adult guidance sectors, albeit on an ad-hoc basis. Career Wales was a significant exception as the organisation was pro-active in regular evaluation. Nevertheless, according to the findings, the longitudinal tracking of client progression still appeared to be in its infancy in the four countries.

## **8.2 Secondary Data Analysis and Findings**

This section addresses the method of data analysis and findings from the secondary data source, the Irish policy documents.

### *8.2.1 Content analysis of Irish policy documents*

The units for analysis were eighteen Irish policy documents from 1997 to 2008. Content analysis was used to individually analyse the policy documents. This required developing a set of procedures for the rigorous examination and analysis of the discourse in the texts (Cohen et al, 2007:475). The procedures involved the creation of a coding schedule and coding manual adapted from Harris (2001, in Bryman & Bell, 2003:202).

The content analysis process involved investigating manifest and latent content in the sampled policy documents. This necessitated evaluating the position of adult guidance in

the policy discourse, examining the role of lifelong guidance to support the three OECD public policy goals, and analysing how client progression is constructed as an outcome in the discourse. Units of text were coded in terms of predetermined categories and themes that had emerged in the earlier literature review. The six specific categories were:

- (i) lifelong guidance and lifelong learning goals,
- (ii) lifelong guidance and labour market goals,
- (iii) lifelong guidance and social equity goals,
- (iv) learning outcomes,
- (v) employment outcomes,
- (vi) personal development outcomes.

Categories (i) to (iii) are at the macro level, and relate directly to the role of lifelong guidance in the achievement of the three OECD public policy goals. Categories (iv) to (vi) are at the micro level, and relate to the construction of client progression in the policy documents. Nineteen dimensions (themes) were identified within these six categories for coding and analysis. Even though Bryman & Bell (2003:205) state that similarities in dimensions are to be avoided this was not possible as the measurement of outcomes is directly related to the achievement of the three public policy goals. *Table 8.4* displays the coding schedule used for coding the units of analysis.

*Table 8.4: Coding schedule for Irish policy documents*

<i>Cat.</i>	<i>Dimensions (themes)</i>	<i>Code</i>		<i>Cat.</i>	<i>Dimensions (themes)</i>	<i>Code</i>
(i)	Support development of knowledge, skills and competencies	1		(iv)	Achievement of knowledge, skills and competencies	10
	Contribute to improving the efficiency of education systems	2			Attainment of qualifications	11
	Improve transition between education/training and work	3			Mobility through qualification pathways	12
(ii)	Enhance labour mobility	4		(v)	Upgrading of skills	13
	Support human capital development	5			Securing work	14
	Assist with economic competitiveness	6			Career mobility	15
(iii)	Support social inclusion of the disadvantaged	7		(vi)	Achievement of personal potential	16
	Encourage equality of access to IAG	8			Lifelong career management skills	17
	Promote active citizenship	9			Actively contribute to society	18
					Improved wellbeing	19

*(Adapted from Harris 2001, in Bryman & Bell, 2003:202)*

The analytical process included a number of approaches: standards (evaluations), indices (frequencies of occurrence), extrapolations (trends and differences) and linguistic representations (Krippendorp, 2004, in Cohen et al, 2007:482).

The position of adult guidance (and/or lifelong guidance) in the policy documents was evaluated using three criteria: 'strong position', 'marginal position' and 'no position'. If adult guidance (and/or lifelong guidance) was identified as having a 'strong' or 'marginal' position in the document, coding was carried out across the nineteen dimensions. If adult guidance (and/or lifelong guidance) was 'not positioned' in the document, coding was carried out across dimensions 10 to 19 to analyse the construction of outcomes. The data was recorded in a coding manual and the data codes then entered into a data sets table. The coding schedule, manual and data sets are available in *Appendix P*.

(i) *Secondary data findings*

The secondary data findings in the data sets table displayed in *Appendix P* will be discussed from three aspects: (a) the position of adult guidance in Irish policy discourse; (b) the role of lifelong guidance to support the OECD public policy goals, (c) and the construction of progression.

(a) Position of Adult Guidance in Irish Policy Discourse

The findings were that adult guidance is strongly positioned in the discourse of ten of the eighteen policy documents. The ten documents range from two government policy documents, two departmental documents, two consultative reports and, unsurprisingly, the four guidance review documents.

In terms of government discourse, adult guidance is 'strongly positioned' in four early government plans and departmental policy documents, NDP (2000), PPF (2000) and the DES's White Paper (2000) and Green Paper (1998). In all of these documents adult

guidance is represented as a significant social inclusion measure for learning and employment strategies within the government's lifelong learning agenda.

However, the position of adult guidance or guidance in general, diminishes in more recent government discourse (NDP, 2007; PPF, 2006). In these documents, where there is an increased emphasis in the discourse on increasing economic competitiveness through education, training and skills enhancement, the position of adult guidance has changed. Guidance, per se, has become embedded in the economic discourse on human capital investment and the building of a knowledge-based economy.

Adult guidance is also 'strongly positioned' in two consultative reports (Forfás, 2007; DETE, 2002) and the four guidance documents (NGF, 2007a; Forfás, 2006; OECD, 2002; NCGE, 1998). In these six documents adult guidance is represented as a key element of a national lifelong learning framework. Significantly, in *Guidance for Life* (NGF, 2007a), adult guidance is positioned as the final stage in the document's proposed national lifelong guidance framework.

In three of the employment related policy documents (DETE, 2004; NESF, 2000; DEE, 1997) adult guidance is only given a 'marginal' position in the discourse, despite the reference to lifelong learning as a key factor in supporting national employment policies. Any reference made to adult guidance is in the context of FÁS provision and the organisation's role in supporting adults' career choice, training and employment options.

Finally, in five policy documents adult guidance or guidance in general, has 'no position' in the discourse. Two of these documents are the most recent government plans which have already been discussed (NDP, 2007; PPF, 2006). In two documents, the *National Framework of Qualifications* (NQAI, 2003) and the *National Skills Bulletin* (FÁS, 2008), the need for information, advice and guidance (IAG) to support education and employment policies is afforded a brief mention. The Forfás *Annual Competitiveness Report* (2007) does not make any reference to any forms of IAG, and only refers to

concerns about lifelong learning outputs in the context of benchmarking Ireland's performance.

(b) Role of Lifelong Guidance to Support OECD Public Policy Goals

As thirteen of the eighteen policy documents refer directly to the importance of guidance in public policy, they were analysed in relation to the role of lifelong guidance to support the three OECD public policy goals, as in categories (i) to (iii). Although an initial analysis finds more or less equal frequency of dimensions in these three categories, a closer examination finds certain disparities in the discourse on the role of lifelong guidance in relation to the three public policy goals.

The findings indicate that there is a greater emphasis in the discourse on the contribution of guidance to achieving labour market goals over learning and social equity goals. This disparity is evident in three document types: the government plans and frameworks (Type 1), departmental documents (Type 2) and consultative reports (Type 3). It is only the Type 4 document, the four guidance reviews, that there is evidence of an equal importance being given to supporting learning and social equity goals.

A closer analysis of the three individual categories, (i) to (iii), finds differences in the frequency of themes in the policy discourse. In terms of the first category, lifelong guidance and lifelong learning goals, two specific themes are found to be more frequent in the discourse. Greater emphasis is placed on the role of lifelong guidance to support the development of 'knowledge, skills and competencies' and 'improving the transition between education/training and work'. Lesser importance is given in the discourse to the contribution of guidance to 'improve the efficiency of education systems'.

In the second category, lifelong guidance and labour market goals, all three themes are frequently mentioned in the policy discourse. Guidance is described as having an important role to play in 'enhancing the labour mobility of workers', 'supporting the development of Ireland's human capital' and 'assisting economic competitiveness'.

Furthermore, as there is a direct correlation in the policy discourse between the impact of lifelong learning on human capital development, guidance is represented as a key factor in supporting individual's knowledge and skills in the future.

With regard to the third category, lifelong guidance and social equity goals, two themes are referred to more frequently in the policy discourse. The findings are that from the late nineties to the present, government policy discourse has positioned adult guidance as a key measure to support the 'social inclusion of the disadvantaged'. Guidance is represented as an intervention to alleviate social hardship experienced by individuals and specific lower economic groups, for example, the unemployed. Allied to this theme is the need for 'equality of access to information, advice and guidance (IAG)' to help all individuals overcome barriers that impede their education and employment progression.

However, the theme of the role of guidance to 'promote active citizenship' is found less frequently in the policy discourse. This concept is found in earlier government discourse and includes inter-culturalism, community building and social responsibility (DES, 2000; PPF, 1999). In later government discourse it forms part of its social infrastructure and social inclusion priorities (NDP, 2007). In terms of guidance policy discourse, this concept is only referred to in one document, where it is viewed as part of the individual's social development (NGF, 2007a).

#### (c) Construction of Progression

All eighteen documents were analysed to determine how client progression is constructed in the policy discourse. The three categories of outcomes, categories (iv) to (vi), were learning, employment and personal development. The overall findings indicate that learning and employment outcomes are given greater significance over the individual's personal progression in the policy discourse. Furthermore, the theme of 'securing work' is found to be the single most significant outcome in the discourse across all of the ten dimensions.

A breakdown of the four types of document found that personal outcomes have less significance in the discourse of documents Type 1 and 3, compared to Type 2 and 4. The outcomes of learning and employment are given primacy in government plans and consultative policy documents (Type 1 and 3). Although both these outcomes are also prioritised in the departmental documents (Type 2), the individual's personal development is more frequently cited in this discourse. In the guidance documents (Type 4), there is more or less an equal balance between the three outcomes, although the employment outcome is still a priority.

Furthermore, a comparative analysis of the dimensions in the three categories of outcomes found that some themes occur more frequently than others. Learning outcomes are constructed more frequently in terms of the gaining of 'knowledge, skills and competencies' and 'mobility through qualification pathways'. This mobility is predominantly defined as upward mobility, although the DES (2000:141) states that Higher Education policy needs to recognise the 'non-linear nature of adult learning'. Within this context, the 'attainment of accredited qualifications' is also a significant outcome that has gained more credence in the discourse since the introduction of the National Qualifications Framework (NQAI, 2003).

With regards to employment outcomes, as already mentioned, the theme of 'securing work' is the most important outcome in all eighteen policy documents. In the discourse the consistent 'upgrading of skills' through lifelong learning is viewed as the means to achieving employability in a competitive economy. Although similar in definition, the theme of 'career mobility', as in transition, promotion and self-employment, is less frequently mentioned as an employment outcome in the discourse.

Finally, despite the absence of personal development outcomes in the policy discourse, two themes are frequently referred to as signifiers of personal progression. Firstly, the 'development of lifelong career management skills', including career resilience, is now an important issue in the policy discourse. This theme is prevalent in the departmental

documents (DETE, 2004; DEE, 1997), consultative reports (DETE, 2002; NESF, 2000) and, not surprisingly, all of the guidance documents. Secondly, the ‘achievement of personal potential’ in the form of talents, learning and work, gained through guidance, education, training, and employment opportunities is prominent in the discourse, particularly in the government department documents.

Less frequently mentioned in the discourse on personal development outcomes are the themes of the ‘actively contributing to society’ and ‘improved wellbeing’. The first outcome is described in terms of establishing oneself within the community and demonstrating an awareness of diversity (NGF, 2007a; DES, 2000). The second outcome refers to the personal and social wellbeing of the individual which can include increased self-confidence, improved decision-making and a better work/life balance. This can involve the removal of personal and structural barriers to encourage personal growth, opportunities for progression and a better standard of living.

*(ii) Summary of secondary data findings*

The data analysis of the secondary data documents provided greater elucidation on the position of adult guidance and the topic of progression measurement in current Irish government policy discourse. Overall, the findings explicated that adult guidance has a significant position in approximately 50% of the sampled policy documents. In particular, adult guidance has been represented as a key measure in the government’s lifelong learning agenda at the beginning of this decade. In later policy discourse it has become less frequent as the focus of government policies changed and the AEGI became embedded in national adult education structures.

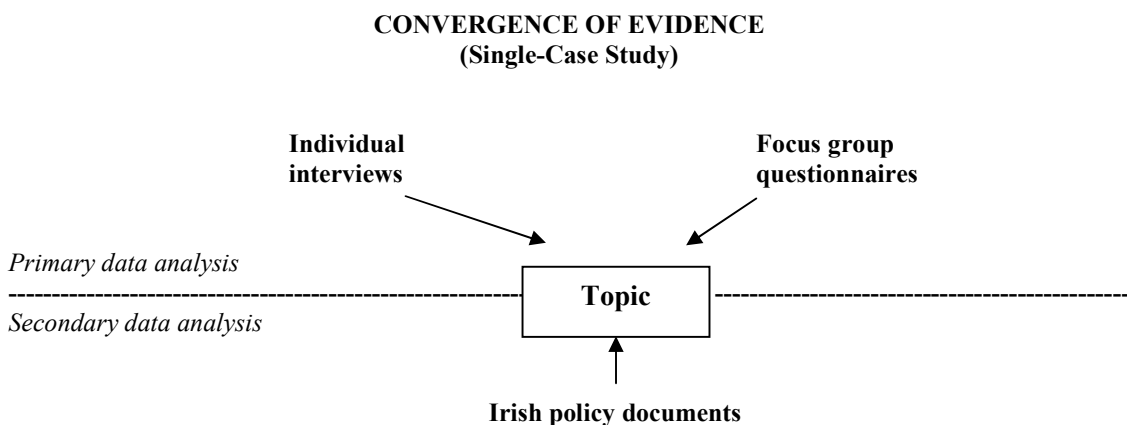
In a broader policy context, adult guidance is represented in Irish policy discourse as a key measure to support the achievement of the three OECD public policy goals of learning, labour market and social equity. The underlying theme in the policy discourse is the continuous development of Ireland’s human capital through the government’s lifelong learning and employment policies. As this is viewed as an imperative for our

economic competitiveness, adult guidance has been represented as a significant support measure to achieve these two goals. The social equity goal is to be realised through the strategic use of guidance in the government's social inclusion policies.

However, an important disparity was found in the policy documents on the topic of measuring individual progression. Not surprisingly, there is a disproportionate value placed on learning and employment outcomes over personal outcomes in the policy discourse. The individual's personal development is excluded in 50% of the sampled policy documents. In particular, despite the prominence given to upskilling and employability, the necessity for citizens' to develop their lifelong career management skills is given very little attention in the policy documents. With the exception of the four guidance documents and the two DETE documents, the topic is insufficiently addressed in the policy discourse within the broader context of the lifelong learning agenda.

### 8.3 Synthesis of Findings from the Three Data Sources

The final stage of analytical abstraction is an integration of data into one explanatory framework (Miles & Huberman, 1994:92). The primary and secondary data sources which form the synthesis of the findings are displayed in *Figure 8.1*.



(Fig. 8.1: Convergence of evidence, developed from Yin, 2003:100)

Miles & Huberman (1994:267) argue that even though triangulation may offer corroboration, the use of different sources can also uncover inconsistencies and conflicting perspectives on the topic under investigation. The mapping of the three discourse positions (clients, practitioners and policy-makers) in the study found both convergence and divergence on the topic of measuring progression. Fundamentally, it is evident that the longitudinal tracking of individual progression in adult guidance practice is a complex and contested issue.

Four prominent themes emerged in the synthesis of the three data sources. These are:

- Defining individual progression
- Outcome measurement
- Rationale for client tracking
- Methodologies for the evaluation of outcomes

### *8.3.1 Defining individual progression*

Parallels were found in the discourses of the clients and practitioners on the issue of defining progression. An important theme in the two discourses is the difficulty of reaching a definition because of the subjective nature of the progression process. The individual case vignettes illuminated the uniqueness of each client's story and the variations in their progression experiences. It also highlighted the multiple realities of the five clients. Such realities involve the balancing of a number of roles related to study, family, and work commitments in the pursuit of personal change and education and career goals over a prolonged period of time.

Both discourses showed that progression as a personal construct is influenced by a complex combination of intrinsic and extrinsic factors. The intrinsic variables can involve the client's self-concept, decision-making, motivation, attributes, expectations goals and personal obstacles. The extrinsic variables can include financial constraints, support systems, mobility, structural obstacles and economic contexts. In addition, issues

of gender, age, historical situations and social status can impact on client's progression experiences.

From a different perspective, a number of these variables were also referred to in the Irish policy discourse in recognition of "the non-linear nature of adult learning", (DES, 2000:141). At a more abstract level there was a specific focus by policy-makers on addressing the extrinsic variables of financial constraints, structural barriers, and mobility in their social inclusion policies. Various support measures, including adult guidance, were deemed necessary to support the removal of barriers to progression for all citizens in Irish society.

The specific issue of obstacles to progression can be explicated through the concept of structure and agency in the three discourses from different perspectives. From the clients' point of view, it was found in their discourse that a range of structures in the Irish education system limited progression and determined the actions of some clients. Cases 1, 2 and 3 had to overcome structural obstacles in creative and innovative ways. In Case 5 the delimiting structure was the client's own social background which had not afforded him the opportunity of a third level education when he was younger. It is evident that the resilient management of structural and personal obstacles gave the clients greater agency in their educational and career progression.

In the practitioners' discourse, agency was viewed from a psychological perspective as having a 'greater sense of agency' in order to 'change personal circumstances and have a greater understanding of the way forward'. From an interventionist perspective, the progression process involved 'enabling and empowering' clients to become free agents in their lives.

Conversely, agency is referred to at a more abstract level in the Irish policy discourse. In general, the concept of individual agency is represented as upward mobility through

qualification pathways and employment structures in the government's employment and education policies.

### *8.3.2 Outcome measurement*

The conclusions drawn from the data on the measurement of outcomes highlighted similarities and differences in the three discourses. A key divergence emerged in the discourse of Irish policy-makers, and the discourse of the clients and practitioners on the position of tangible (hard) indicators versus intangible (soft) indicators in outcome measurement.

On the whole, in the policy discourse education, training and employment outcomes (hard) were given greater salience over personal outcomes (soft). More specifically, the employment outcome was represented in the policy discourse as the most significant indicator as it related to our economic competitiveness. Guidance was positioned as a key measure to support the achievement of this policy goal in the government's lifelong learning agenda. An exception was found in the departmental and guidance policy documents where soft outcomes were referred to in terms of the personal and social development of the individual.

In contrast, the discourse of the clients and practitioners was more balanced. They both argued that the consideration of a wide range of outcomes is necessary for a satisfactory measurement of progression. Outcome measurement should attend to the hard and soft outcomes experienced by clients. However, greater importance was given in both discourses to soft outcomes that reflect the personal development of the client.

In the clients' discourse, all of the clients had aspired to the achievement of hard outcomes in the form of qualifications and/or employment. It was their primary reason for seeking guidance. In tandem with these outcomes they had all experienced a wide range of soft outcomes which they deemed valuable to gauge their progression. From the

practitioners' perspectives, hard outcomes were deemed of less significance compared to softer outcomes which they argued reflected the real change and progression of the client.

A wide range of hard and soft outcomes were proposed for measurement by the clients and practitioners as indicators of true progression. Such indicators ought to reflect changes in circumstance and the reality of the client's current situation. Hard outcomes should include education and training achievements, both formal and non-formal, accredited and non-accredited qualifications; and employment attainment such as securing work, self-employment, career progression, voluntary work and active retirement.

Overall, soft outcomes need to relate to the psychological, behavioural and social development of the client over a period of time. They ought to include indicators that reflect the personal and professional growth of the individual, i.e. self-confidence, motivation, attitude, personal satisfaction, hard and soft skills, goal attainment, involvement in social networks and contribution to one's community.

### *8.3.3 Rationale for longitudinal client tracking*

The rationale for longitudinal tracking was considered somewhat differently by the three different stakeholders. The argument was upheld in the discourses of the clients' and practitioners' that a longitudinal tracking tool should incorporate a wide range of the aforementioned hard and soft indicators to adequately capture the nature of progression experienced by clients. The underlying principle for client tracking in the policy discourse is one of quality assurance (NGFa, 2007).

From the clients' perspective longitudinal tracking was viewed as a reciprocal process between the guidance service and the user that could offer benefits to both. It was argued that longitudinal tracking could legitimise the client's progression or non-progression experiences and offer appropriate interventions if needed. It could serve as a stimulus mechanism to remind clients of the availability of guidance to them or other prospective

clients. It could also provide feedback to guidance services and education providers about the reality of clients' current situations and highlight service or structural improvements to support adults in their ongoing progression.

Two findings that specifically relate to the evaluation of outcomes in the Irish Adult Educational Guidance Initiative (AEGI) were addressed in the clients' discourse. Firstly, at the time of the individual interviews, the adult guidance management system (AGMS) categorised client progression in terms of 'education readiness' and 'employment readiness'. Changes have since been made to the AGMS, as described in Chapter 2, and progression is now categorised on the AGMS as 'intended progression' and 'actual progression'. Nevertheless, based on the earlier categories, the clients argued that determining readiness is ultimately the responsibility of the client, not the practitioner. As personal change for clients takes time, the concept of progressive readiness which emerged in the client discourses is not reflected in the AGMS. Progressive readiness denotes the psychological and behavioural preparation involved in progressing from one stage to the next.

Secondly, the language employed by policy-makers in the current discourse on evaluating guidance outcomes was incompatible with a helping model. The use of 'customer' or 'consumer' signified an economic discourse that was far removed from the discourse of the personal. Specifically, it was argued by one client that the language of experts negates the subjectivity of the client. The term 'client' was deemed more appropriate for the conceptualisation of the person-centred approach used in the guidance counselling process.

From the perspective of the practitioners, the person-centred approach which underpins their practice is being undermined by the necessity to achieve hard outcomes reflected in the use of client tracking systems in their organisations. The dominant view in their discourse was that the assessment of client progression was a 'target driven' process dictated by government policy measures, continuation of funding and the achievement of

national economic goals. Securing tangible outcomes placed pressure on practitioners to progress or 'move on' clients into education and employment. Since outcomes were viewed by their stakeholders (employers, funders, policy-makers) as 'tangible and linear', it was argued that little attention was being given to intangible outcomes and the vagaries of individual progression in client tracking systems. In addition, client tracking was ad-hoc across the sector.

Aside from the guidance policy documents, very little attention was given to the issue of longitudinal tracking in the Irish policy discourse. However, the overall lack of client monitoring systems in Irish guidance practice was identified as a specific weakness in linking policy-making and practice by the OECD in 2002.

#### *8.3.4 Methodologies for evaluation of outcomes*

Finally, the issue of the application of suitable methodologies to evaluate outcomes in adult guidance practice was partial across the three discourses. It has most recently surfaced in Irish guidance policy discourse as a response to the recommendations of the OECD Country Review (2002). The argument is that the development of an integrated framework for lifelong guidance must include quality assurance measures that encompass both "qualitative and quantitative methods", (NGF, 2007a:21). Furthermore, "assessment and evaluation of the quality of guidance should be balanced and include personal/social, educational and vocational aspects of the service" (p.22).

In the clients' discourse a number of different viewpoints emerged in relation to the topic. There was a general consensus on the use of quantitative methods which ought to capture a broad range of hard and soft outcomes. However, one client argued that questionnaires can be biased and inflexible and, therefore, cannot adequately reflect the variances of meaning in clients' experiences. As an alternative to quantitative methods, some clients recommended the use of case studies of previous clients. This method could capture the subjective nature of individual progression and serve as models to support clients in their education and career development.

With regard to quantitative versus qualitative methods, the response by the guidance practitioners was more limited as there was not a specific question on methodologies in the focus group questionnaire. As the practitioners advocated the need for outcomes to be measured from a psychological, behavioural and social perspective it can only be envisaged that a balance of quantitative and qualitative methods would be appropriate in the field.

In conclusion, synthesis of the overall findings highlighted a major disparity with regard to the value assumptions espoused by Irish policy-makers and the personal experiences of clients and guidance practitioners. The construction of learning and employment (hard) outcomes as a more desirable measurement of progression in Irish government policy reflects a logical-positivist perspective that diminishes the subjectivities of clients in the evaluation of long-term outcomes in adult guidance.

#### **8.4 Conclusion**

This chapter concentrated on the textual analysis and findings from the three data sources (clients, practitioners, policy-makers) from a triangulated perspective. Synthesis found both convergence and divergence in the three discourses on the topic of the long-term measurement of client progression. A number of key issues emerged that are relevant to the development of a best practice framework for the longitudinal tracking of client progression in the field. The issues relate specifically to definition, measurement, rationale and appropriate methodologies. The interpretation of the findings using a critical discourse analysis (CDA) approach is addressed in Chapter 9.

## **Chapter 9: Discussion**

### **9.0 Introduction**

The focus of this bottom-up explanatory single-case study has been the examination of the longitudinal measurement of client progression in the current tracking system used in the Irish Adult Educational Guidance Initiative (AEGI). The study has been underpinned by a critical constructivist paradigm and a reflexive methodology. This chapter presents a critical interpretation of the data in the context of previous research findings through the lens of critical discourse analysis (CDA). The triangulation process enhanced the trustworthiness of the data and explained a range of issues on the topic of the long-term measurement of progression in adult educational guidance. Convergence and divergence was evident across the discourses of the three prominent stakeholders (clients, practitioners, policy-makers).

### **9.1 Interpretation in Single-Case Study**

The presentation of a case description is the final phase of this single-case study (Yin, 2003:109). In the study the construction of meaning on the measurement of client progression in longitudinal tracking systems highlights significant tensions in the different discourses. A critical interpretation of the differing perspectives in adult educational guidance involves the use of triple hermeneutics (Alvesson & Skoldberg, 2000:144). Alvesson & Skoldberg propose that critical interpretation can involve:

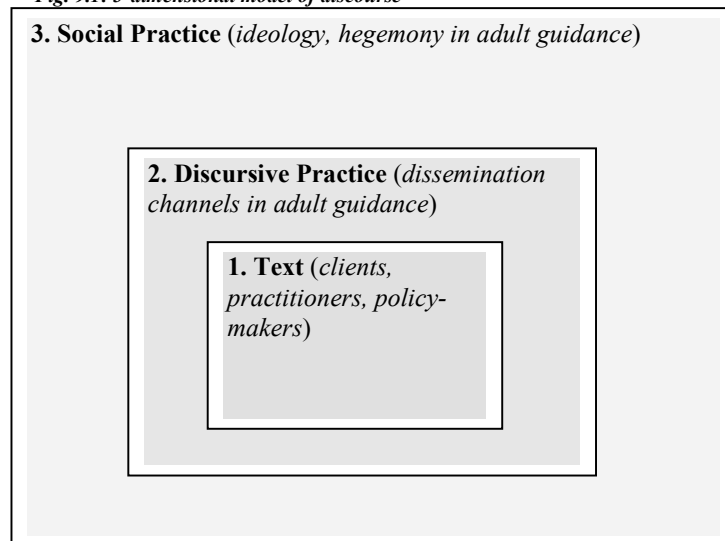
Self-reflection on elements of dominance in the researcher's line(s) of interpretation; the identification of and critical reflection on potentially problematic forms of authority; openness to other representations, interpretations and conclusions than those favoured.

(Alvesson & Skoldberg, 2000:255)

A critical interpretation of the findings of this study within the context of the three OECD public policy goals of learning, labour market and social equity involves a set of complex issues. These issues are concerned with ideologies, power relations and the privileging of certain interests over others. Critical discourse analysis (CDA) is used to critically examine the ways in which the forms of language in the discourses serve social, ideological and political interests in policy and practice in the field of adult guidance.

This involves the systematic recursive movement between linguistic and social analysis in the data and the literature (Rogers, 2004:7). Fairclough’s (1992:73) three-dimensional model of discourse is used as an interpretive framework to interpret the textual findings from the three data sources (clients, practitioners, policy-makers) with the discursive and social practices in adult guidance. This model was explained in detail in Chapter 6 (6.5.3). See *Figure 9.1* for a display of the model.

*Fig. 9.1: 3-dimensional model of discourse*



*(Adapted from Fairclough, 1992:73)*

Finally, reflexivity is used in the interpretation of the meaning of the research findings and the emergence of new theory on the topic under investigation. Creswell argues that as interpretation is the most subjective phase a reflexive researcher is obliged to:

realize that their interpretation is only one possibility, and that their report does not have any privileged authority over other interpretations that readers, participants, and other researchers may have.

(Creswell, 2005:448)

Conversely, Alvesson & Skoldberg (2000:287) believe that a reflexive interpretive approach “can improve the outcome, in the shape of research which succeeds in saying something qualified and original”. As this has been the aspiration of this interpretive study a critical reflexive approach has helped to strengthen my interpretation of the main

issues that have emerged in the research in the context of previous research and current developments in the field.

In answer to the main research question “*How is client progression measured in the current longitudinal tracking system in the Irish Adult Educational Guidance Initiative (AEGI)?*”, the research finds that individual progression is insufficiently measured within the AEGI. Fundamentally, the findings show that there is a greater value placed on education and employment outcomes over personal development outcomes experienced by clients in the current AEGI tracking system. However, these findings highlight a set of complex issues related to definitions, rationale and methodologies for measurement in guidance. This will be discussed through the three over-arching themes that emerged in the study. The themes are:

- 1) The definition of individual progression in adult educational guidance.
- 2) The measurement of progression in adult educational guidance.
- 3) The design of longitudinal tracking systems in adult educational guidance.

## **9.2 Defining Individual Progression in Adult Educational Guidance**

The difficulty in reaching a precise meaning for progression in the research supports McGivney’s (2002:11) argument that the word ‘progression’ has no universally accepted definition. Even though Watts & Kidd (2000:494) refer to career progression in the general terms of the “individual’s lifelong progression in learning and in work”, the five clients’ constructions show that progression can mean different things to every individual. Findings from the clients’ and guidance practitioners’ discourse in the study indicate that measuring progression is an extremely complex process. As one practitioner stated ‘it is very difficult to measure *true* progression as it is often in unquantifiable area/aspects of their life – personal or social’. From another practitioner’s perspective it is a person-centred process whereby true progression is ‘prescribed by the client’.

As a personal construct of the client, progression is subjective, multi-faceted and context-specific. It involves a range of intrinsic and extrinsic variables. Intrinsic variables can

include age, gender, decision-making, attitude, motivation, attributes, personal barriers, expectations and goals. Extrinsic variables can involve roles, support systems, mobility opportunities, structural barriers and economic contexts. As a subjective process, the career experiences of the five clients in the case study supports Kidd's (2006:10) view that individuals "now have to cope with fragmented working lives and continuous transitions across the lifespan". Such transitions can be both intentional or outside the client's control and, as Beck (2001:398) suggests, involve risk and uncertainty as personal and economic situations change over time. Therefore, the concept of progression is interpreted from three dimensions; namely, progression as a process, obstacles to progression and progression as an outcome.

### *9.2.1 Progression as a process*

In general terms, progression signifies the process of advancement or movement forward from a less favourable position to an improved position. However, the process aspect of learning and guidance is overlooked by policy-makers in the drive for standardised and measurable parameters (McGivney, 2002:36). Progression is represented as a linear, vertical process of upward mobility from one level of qualification to the next level in Irish policy discourse (NQAI, 2003:5). *Table 9.1* displays the five clients' progression from the start of their guidance intervention up to the close of the fieldwork in 2009.

As the data in *Table 9.1* indicates, a major theme that emerged in the study is the lack of linearity and the time issue involved in measuring clients' progression which is not reflected in positivistic analysis by the DES. Although vertical progression remains a strong policy issue the variabilities in the clients' experiences show that this may be an incongruous concept for adult learners. Despite the relatively smooth transition into education and employment experienced by some of the clients, Katherine and James's education experiences show how adult learning and career pathways can be non-linear and unstable. Equally, as McGivney (2002:15) claims, pathways can be cyclical and zig-zag in different directions. As adults may bring their past learning experiences to new situations, progression can also be measured retrospectively by clients who left school early or experimented with different learning options before finding their niche.

*Table 9.1: Client progression paths*

	<b>Start of Progression</b>	<b>Progression status: 2005</b>	<b>Progression status: 2006</b>	<b>Progression status: 2009</b>
Joan (2003)	college application →	delayed progression, subbing work →	delayed progression subbing work →	PG qualification, returned to previous work
Katherine (2001)	enters college →	taken time-out of education →	lack of progress →	left education, voluntary work
James (2001)	enters college →	on f/time HE course →	HE qualification, & studying at higher level →	left education not working
Owen (2001)	starts p/time education →	on p/time FE course →	FE qualification, work/studying at higher level →	destination unknown
Derek (2001)	enters college →	on f/time HE course →	HE qualification, & new career →	in same job since 2006

*(Key: p/time = part-time, f/time = full-time, PG = postgraduate)*

As Savickas (2000:58) claims, the findings of this research show that the concept of a linear career across the lifecourse needs re-conceptualisation as a ‘career’ meant something different to each of the clients. The majority of the clients were forced to manage new career transitions for personal and economic reasons. In Katherine’s situation, her educational progression cannot be defined in sequential steps as it is related to her family cycle (Kidd, 2006:43). Furthermore, the longitudinal tracking of the clients highlighted how clients’ personal lives can impact on their career progression, for instance, Joan (marriage), Katherine and Derek (family), Owen (family inheritance) and James (health).

The personal, social and economic elements of progression and its life-changing effects on individuals were demonstrated at different levels in the clients’ discourse. For Joan progression had meant not just a qualification but a significant period of personal growth between 2003 and 2008. The achievement of a professional qualification and a new career meant both personal and economic progression for Derek. In contrast, the meaning of educational progression had changed for Katherine and James by 2009.

Whilst Katherine who is 'over 60 now' had decided to contribute her new skills to the voluntary sector, James felt 'too old, too long in the tooth for working' anymore.

Law (1996:46) argues that progression as a career process is a "learned sequence of career-development capacities and behaviours". The complexity of the five clients' career experiences supports this analysis and challenges the assumptions inherent in earlier career development theories that view career progression as a task-oriented stage process across the lifespan. In particular, the three older clients show that even in middle and later adulthood, adults return to education for a variety of reasons including personal values and the achievement of unused potential (Ford, 2005:4). Even though Gottfredson (2002:100) argues that vocational experiences are determined early in life through gender and social class, Katherine's and Derek's narratives show that vocational decisions can be reconfigured later in life when the time is right to return to education. In contrast, as Kidd (2006:36) states, the experiences of the two younger clients suggest that major career transitions can occur around age thirty. Such transitions are often approached with caution and careful planning as clients attempt to leave their comfort zones over a period of time.

Nonetheless, what emerged in the older clients' narratives was that even though adults may demonstrate high levels of commitment at the outset of education these can change over time, based on personal priorities, motivation and attitudes. Richardson (2004:486) refers to this as the rewriting of one's career script. For example, a financially viable career was a priority for Derek as he still had a young family to support. However, both Katherine's and James's motivations had changed over time and they had rewritten their career scripts due to family and health priorities. Leaving education was an easier option for them as they had financial security and conventional work was no longer their main concern.

Central to career development and progression is the career decision-making process. All of the clients had to make important career decisions and choices at various points in

their lives pre- and post-guidance intervention. The findings show that the career decision-making process is both individual and context specific for clients. Overall, five career decision-making styles emerged as the clients had to consider other people in their lives and cope with a range of obstacles during their progression. Four styles have already been identified by Bimrose et al (2008:33). The fifth, a circumspective decision-making style, emerged from the data in this study. This style was adopted by Owen and involved a judicious approach over a period of time that was based on his abilities, economic and familial situation. However, even though the majority of the clients' decision-making styles were consistent over time, James's strategic style had changed by 2009.

Furthermore, the process of progression can only begin when clients decide to move forward and make psychological and behavioural changes in their lives. The practitioners in the study believed that such changes allow clients to become free agents in their lives. From the clients' perspectives, the concept of a progressive readiness emerged in relation to the preparation needed that involves careful consideration and planning by clients. Joan described this process as 'a fearful decision...making that change...and that change brings with it a rollercoaster of emotion, doubts and questioning'. In addition, chance or planned happenstance, which has been identified by Mitchell et al (1999:1) as an element of career decision-making, played an important role in three clients finding guidance when the time was right for them to make changes. However, one of the major factors that had influenced the clients' decision-making was the diverse range of structural and personal obstacles encountered over the course of their progression.

### *9.2.2 Obstacles to progression*

The dismantling of structural blockages to educational progression is central to Irish adult education policy (DES, 2000:32). Even though three clients encountered the structural obstacles of course postponement (Joan), inflexible provision (Katherine) and course attrition (James), two clients remained unaffected by structural obstacles (Owen and

Derek). It can be argued, to a certain extent, that these structural obstacles compromised the agency of the three clients in their educational progression at various points. In the case of Derek, the structural obstacle of his social background had influenced his decision not to pursue education in his earlier life which had resulted in years of low-paid employment and frustration.

By and large, personal obstacles were more common for the clients in the study, signifying that the more immediate dispositional barriers of self-concept, blocks to learning and the realities and responsibilities of everyday life interfere with progression (Clayton, 2004:1; Rogers, 1996:68). Even though Lynch (1999:206) argues that the financial obstacle is regarded as the primary barrier to participation in HE it was only a significant obstacle for two of the clients. Instead, age was the prevalent theme in the creation of new careers and the management of education gaps during transitions from one stage to the next (Kelly, 2004a:46). In addition, family responsibilities, health issues, lack of support from family and friends and low self-confidence were consistent obstacles for the clients in the study (Bimrose et al, 2008:5; NGF, 2007a:37; Taylor et al, 2005:115). Poor time-management and the constant juggling of family and work commitments led to personal compromises and a reduced quality of life for the majority of clients at some point in their progression.

Despite the lack of attention given to emotional resilience in career theory according to Kidd (2006:49), the findings show that this is a significant factor in clients' ability to overcome a range of structural and personal obstacles and their sense of wellbeing. It is also an important issue that is largely ignored in the policy discourse on the measurement of outcomes. All of the clients demonstrated high levels of emotional resilience in managing adversity at various points in their progression. A range of emotions were experienced from 'frustration' and 'disappointment' to 'surprise' and 'pride'. Each of the clients had proactively coped with stressful challenges by being creative, responsive and adaptive to change. Their personal coping strategies included subbing work, cutting back to part-time learning, acquiring individual learning techniques and developing new work

practices. Furthermore, a sense of personal discovery emerged in the creative solutions that they applied to overcome obstacles for successful outcomes.

Even though all of the clients in the study demonstrated varying degrees of internal and external locus of control, it was more pronounced for Joan and James (Rotter, 1966, in Hayes, 2000:407). As Joan had an internal locus of control she learned to manage her stress better when she accepted that some things were outside of her direct control, such as a course start date. James, on the other hand, had an external locus of control. He believed that he was a victim of circumstance and eventually gave up on his dream of a new career.

Betz (2004:2) contends that low self-efficacy expectations can lead to avoidance, poorer performance and a tendency to 'give-up' early when obstacles seem insurmountable. Two of the older clients did equate their lack of educational progression with their age and inability to perform compared to the younger students in third level. However, underlying issues such as a change of personal priorities, poor health and lack of institutional support played a part in both Katherine and James 'giving-up' on education by 2009. In contrast, despite Derek's feelings of low self-esteem starting out in education, he believed that he was capable of getting a qualification and a new career. Regardless of the obstacles he encountered on the way, his confidence and self-belief grew over the four years in education. Given his family responsibilities giving up was not an option for him. In spite of some confidence issues, low self-efficacy was not a major obstacle for the two younger clients suggesting that they were extremely committed to their ultimate goal of a career change.

### *9.2.3 Progression as an outcome*

Even though progression is viewed as an outcome of successful learning in education, it can also relate to how individuals develop personally and socially as a result of their learning experiences (McGivney, 2002:12). A key definitional issue that surfaced in this study is one of semantics. Tensions emerged across the various discourses in the data

and the wider literature on the meaning of progression as an outcome for measurement in the field. This issue has methodological implications which are discussed in 9.3.

Despite the considerable divergence in the language and constructs used to define outcomes the data shows there is a general consensus that progression outcomes are viewed in terms of either *hard* and tangible, or *soft* and intangible outcomes. However, the greater importance given to the hard outcomes of education, employment and social equity in Irish policy is synonymous with a broader policy discourse that views these outcomes as more valuable than the personal outcomes experienced by the individual. In particular, *securing employment* has been the key hard outcome in Irish policy discourse for some time. Despite this focus on employment there has been a lack of emphasis on the necessity for citizens to develop lifelong career management skills in much of Irish policy discourse, even though it has become a major theme in European guidance policy discourse, such as the Council of the European Union (2008:1; 2004:2).

From the practitioners' perspective in the study, hard outcomes relate to the diverse range of achievements in education and employment. As any achievement is subjective the outcome can vary from completing an accredited or non-accredited course to securing employment or 'even getting people to turn up for an interview'. Even though all of the clients were primarily motivated to achieve educational and employment outcomes at the outset of guidance, the final outcomes achieved suggest that the significance of qualifications and paid employment can change for adults over time. In applying Killeen's (1996c:74) four types of outcomes model to measure the clients' outcomes all of the five clients had experienced on some level a range of immediate, intermediate and ultimate outcomes at the individual level. However, of those followed-up in 2009, only Joan and Derek are contributing to the ultimate outcomes at the system level in the form of increased labour productivity. This would appear to confirm the view put forward by Kidd (2006:86) that the ultimate outcomes experienced by individuals which may eventually impact on labour market processes can take a considerable amount of time to materialise.

There is a general consensus that education and guidance can have transformative, life-changing effects on individuals, especially adult learners, and that these intangible outcomes are as significant as tangible outcomes (Maguire & Killeen, 2001:18; Blaxter et al, 1998:135). This was certainly the case for the majority of the clients whose engagement with further and higher education had resulted in both types of outcomes. The findings from this study are that delineation between hard and soft outcomes is complicated as new learning and skills led to greater self-confidence which produced higher qualifications and new career opportunities for some of the clients.

Hansen (2001:1) argues that the softer outcome of personal development is a major task during times of change and transition in an individual's life. The practitioners in the study defined these personal outcomes in terms of clients' psychological, behavioural and social development that allow for positive changes in their lives. All of these elements emerged in the five clients' constructions of their own personal development. The achievement of personal outcomes such as greater self-confidence, enhanced wellbeing, openness to learning and clarity of vision helped them to progress forward. As referred to by Herr et al (2004:625) the majority of the clients had a greater sense of agency within the broader context of their personal relationships and varied work environments following guidance intervention. Csikszentmihalyi's (2002:6) concept of 'flow' can be found in Derek's pursuit of a consciously chosen and realistic goal that allowed him to achieve a personal ambition and a career dream. Moreover, a sense of empowerment emerged in the clients' verbalisation of the personal outcomes at various points during the two phases of the research interviews.

From a behavioural perspective personal change can involve any type of movement forward from a shift in attitude to a new career. The findings of the study corroborate Sugarman's (2001:135) claim that some clients tend to measure their progression in terms of milestones. The starting point for measurement may be pre- or post-guidance intervention based on the client's own expectations of their progression. Joan's story indicates how progression can also be determined by the time it takes a client to change

and by factors external to the client such as a course suspension. Therefore, the amount of distance and time involved in a client's progression towards hard outcomes (education and/or employability) can be underestimated by clients, practitioners and policy-makers. The process may not always be related to the client's level of ability or motivation. While it had taken Derek five years to gain a professional qualification and a new career, it had taken Joan the same length of time to attain a shorter postgraduate qualification because of a structural obstacle. Within a similar time frame James, who had struggled with his health, had progressed from further education to a third level honours degree, Owen had progressed from further education to professional training and employment.

Maguire & Killeen (2003:5) argue that the third hard outcome of social equity also needs to be recognised in an analysis of individual progression. In Irish policy discourse, social inclusion is a strong policy goal for enhancing individual mobility and a better standard of living. From the practitioners' perspective in the study, this personal element may mean improved social skills including 'increased involvement in their community/family lives'. Even though it may not have been a conscious goal at the outset, the majority of the clients had experienced some social benefits from guidance intervention and their return to education. These benefits included greater earning potential, new friendships and making an active contribution to their community through voluntary work.

A strong discourse on outcome measurement in guidance has emerged at the interface between policy and practice in recent years. The drive to achieve the three OECD public policy goals is now being filtered down to practitioners on the ground through expert groups, an international policy centre (ICCDPP), policy publications, conferences and international symposiums. Nevertheless, despite these inclusive discursive practices, it would appear that there is still a lack of consensus in policy and practice on appropriate performance indicators and evaluation procedures at a national and international level. In Ireland, the AEGI services now face major challenges if they are to implement strategies for measuring benefits as part of a presumptive process rather than an empirical one at policy level. Evidence from the empirical data gathered in this study confirms the range

of both hard and soft outcomes that need to be captured in impact measurement and the valuable contribution of the clients and practitioners in evaluation processes.

### **9.3 Measurement of Progression in Adult Educational Guidance**

The measurement of progression in the AEGI is intertwined with the wider debate on quality assurance and the evaluation of the long-term outcomes of guidance intervention. There is a presumption in current policy discourse that the ultimate outcome from career interventions is the economic one which “relies mainly on demonstrations that effects on individuals eventually impact on labour market processes” (Kidd, 2006:86). Some of the motivations for gathering evidence on the economic benefits are the justification of funding, best value and the setting of quality targets for providers (Hughes et al, 2002:4). However, the prevalence for the economic outcome in policy discourse is widely critiqued as it neglects to capture the personal progression of individuals. What emerged in this research is that progression can involve the attainment or non-attainment of both hard and soft outcomes that may or may not have an economic outcome for the individual client.

#### *9.3.1 Methodological issues for the evaluation of outcomes*

The proposition by Watts (1996b:380) that career guidance is both an object and instrument of public policy has a direct bearing on the measurement of its impact on individuals and society. Evaluation is a contentious issue as guidance practice is informed by a number of ideological perspectives and hegemonic practices. Guidance can be viewed as a conservative means of social control that maintains the status quo through its focus on meeting the needs of the labour market and wider society (Watts, 1996a:353). It is also argued that the liberal model co-opts career guidance as a mechanism for surveillance and social control as organisations face increasing pressure to justify funding and provide guidance for social compliance (Douglas, 2005:35). The findings from the practitioners’ discourse indicates that the effects of cost-benefit analysis have a palpable effect on provision on the ground as practitioners need to prove the economic worth of guidance to managers, funders and policy-makers.

The dominance of the rational economic model and the various power relations underpinning evaluation in practice surfaced in the discourse of the UK practitioners. Over two-thirds of the practitioners claimed that there was a lack of consensus between themselves and the stakeholders in their organisation (managers, funders, policy-makers) on the measurement of progression. The practitioners argued that there is an assumption by their stakeholders that hard quantitative data measures progression. Tangible outcomes are 'target driven by contracts and funding can be dependent on progression into course starts'. As Bimrose (2006:2) argues this has privileged quantitative outcomes at the expense of qualitative outcomes, competition for resources, and higher levels of accountability. This implies that the continued existence of adult guidance services in the UK is insecure and dependent on the allocation of funds based on performance targets generally specified in formal funding agreements (Hughes & Gration, 2006:10). Despite this practice, Hughes & Gration state there is still a lack of concrete evidence to link financial investment and costs directly to outcomes as opposed to service delivery. In Ireland, funding allocation in the AEGI is currently based on a service level agreement between the DES and the VEC/WIT which involves the monitoring of service provision through quarterly reports. If a service does not meet the service level requirements it is liable to have its funding rescinded, as was the case with the County Louth service in Phase 1.

On the whole, the critical discourses in the field propose that qualitative data is being overlooked in the pursuit of quantitative outcomes. Qualitative evaluation studies such as interviews and longitudinal case studies may be costly and time consuming but can provide valuable evidence of the subjective nature of progression. In Finland, for example, as vocational guidance is under government review, the spotlight is now focused on quantitative and qualitative analysis of the cost-effectiveness of provision in both the education and employment sector (Felt et al, 2007:11). My observation of a Finnish public employment service (PES) confirmed what is achievable in evaluation procedures if sophisticated methods, funding and human resources are available on a large scale. In contrast, monitoring practice in the Irish public employment service

(FÁS) and the AEGI focuses on quantitative outcomes to the detriment of an adequate measurement of a broad range of qualitative outcomes for clients.

As the use of the conventional (positivist) paradigm in guidance evaluation has been critiqued for some time, a resolute move is now being made in Irish guidance policy towards the inclusion of interpretive methods in quality assurance processes (NGF, 2007a:21). Whilst the conventional method is used for replication and generalisations, the evidence in this study confirms that it is limited in its ability to capture the discovery processes and contextual factors in clients' progression experiences. Etherington (2001:9) emphasises the value of qualitative research as it can, like the intervention process itself, help clients to develop new insights. This emerged in the study as the clients were given the space to reflect on their experiences. The adoption of the constructivist paradigm explicated how clients construct, deconstruct and reconstruct their career stories over time in a number of contexts including psychological and social (Young & Collin, 2004:378). These contexts were corroborated in the practitioners' discourse and alluded to in a minority of the Irish policy documents.

### *9.3.2 Constructivist evaluation model*

From a constructivist perspective, the four dominant discourses identified by Young & Collin (2004:379) emerged in the study. The dispositions discourse, based on a positivist epistemology, is the dominant discourse used by Irish policy-makers to objectively quantify outcomes in adult guidance. In contrast, the contextualizing discourse, the discourse of subjectivity and narrative, and the process discourse were evident in the discourses of the clients and practitioners.

Specifically, the career narratives of the five clients demonstrate how adults' education and career progression experiences are located within the broader social, economic, historical and temporal contexts of their everyday lives. The case vignettes brought to light the subjective issues of identity, agency, and purpose in the clients' constructions of self over time. From a critical standpoint, the individual interviews allowed for a co-

construction of meaning and mutual agreements on working definitions of reality in the five clients' career stories. The clients' life stories verified the range of complex processes involved in an individual's career progression that guidance counsellors attend to on a daily basis with clients. As Bujold (2004:471) claim, such processes include decision-making, risk-taking, overcoming obstacles, chance, and inner conflicts. These subjective factors are neglected by evaluators and policy-makers who favour objective measures of individual progression.

The prevalence in Irish policy discourse for the construction of progression in terms of learning and employment outcomes signifies the "taken-for-granted" assumptions embedded in the powerful discourses of policy-makers identified by Reid (2006:37). This myopic, albeit pragmatic, view of classification neglects to account for the variabilities in clients' experiences and their personal development over a long-term period. As practitioners we are complicit in supporting these political power structures through the monitoring and evaluation procedures we are required to use in practice. Nonetheless, it may be possible to challenge the hegemonic practices of funders and policy-makers by supporting the move towards a more democratic approach in evaluation methodology.

The evidence in the primary data findings suggests that the democratic inclusion of two key stakeholders, the client and practitioner, can serve as a basis for determining the information required in outcome evaluation in adult guidance (Kelly, 2004b:533; Killeen, 1996a:332). There may be an assumption by policy-makers that clients are unaware and disinterested in issues of evaluation and accountability when their more immediate need for help and support takes precedence. Even though the intricacies of quality assurance processes may not impact directly on the clients' everyday lives, a number of the clients were cognisant of the need for publically funded organisations like REGSA to assess their provision to users. For example, Joan stated:

...they [DES] are providing the funding for a service that is valid so I suppose they just want to see if it is working well, where people are, are people availing of it, am I think it is probably fair of them to ask that...anyway I have no problem being a statistic.

Similarly, Owen said “I suppose they would like to see the number of people that went looking for information on education and whether they took it up then or not”. However, he also stressed the need to assess what is overlooked in evaluation such as those clients who experience non-progression. This type of data would be extremely relevant for identifying both personal and structural blockages that might need more client-centred measures to support adults in their progression.

Furthermore, a number of key findings emerged in the study that can be related to the constructivist propositions found in Guba & Lincoln’s (1989:109/110) evaluation framework, cited in the methodology chapter (Chapter 5). A comparison between the conventional (positivist) and constructivist methodology applicable to evaluation contexts is displayed in *Table 9.2*.

*Table 9.2: Theorems applicable to evaluation*

<b>Item</b>	<b>Conventional (Positivist) Methodology</b>	<b>Constructivist Methodology</b>
(i) Values and Evaluation	Evaluation produces data untainted by values. Values distort scientific data.	Evaluation produces reconstructions where ‘facts’ and ‘values’ are linked. Valuing provides basis for attributed meaning.
(ii) Accountability	Accountability can always be assigned as it is determinable by cause and effect. Maintenance of status quo.	Accountability characteristic of a conglomerate of mutual and simultaneous shapers which limits possibility of praise or blame
(iii) Objectivity of Evaluation Findings	Evaluators can position themselves to support the objective pursuit of evaluation activities	Evaluators are subjective partners with stakeholders in the literal creation of evaluation data
(iv) Function of Evaluators	Evaluators function as communication channels through which data are passed to the relevant audiences of reports	Evaluators are negotiators aiming for consensus on better informed and more sophisticated constructions
(v) Legitimacy of Evaluation Findings	Scientific evaluation data have special legitimacy and special status that confer on them priority over all other considerations	Constructivist evaluation data have neither special status nor legitimation; they represent simply another construction in move toward consensus

*(Source: Guba & Lincoln, 1989:109/110)*

Concerning the five items listed in the evaluation framework this research ascertained the following:

- i. Regarding values and evaluation, the discourse of the clients and practitioners in the study show that the attribution of meaning on progression is subjective and

value-laden, and therefore generalisability is problematic. Specifically, the particularity and uniqueness of the five client cases underline the difficulty of quantifying the various elements of personal progression through the conventional paradigm.

- ii. In terms of accountability, the conventional methodology seeks to determine what went wrong, why and who is to blame (Guba & Lincoln, 1989:110). Guba & Lincoln argue that the conventional methodology can be an instrument for maintaining the status quo of those already in power. In adult guidance, the equation of hard outcomes with specific hard targets for the continuation of funding places pressure on practitioners to be accountable for their provision at the expense of all other types of softer outcomes. A constructivist methodology could help to re-dress this hegemonic practice through a democratic inclusion of all relevant stakeholders in the design of evaluation methods that measure a broader range of outcomes.
- iii. In relation to objectivity of evaluation findings, the adoption of the constructivist paradigm in the study has shown that it is possible to create empirical data on outcomes with two of the key stakeholders (client and practitioner) for the purposes of evaluation. This empirical data can help to create both hard and soft constructs for long-term evaluation methods such as longitudinal tracking.
- iv. In terms of the function of evaluators, the co-construction of meaning in the dialogues with the five clients elucidated the possibility for consensus on better informed and more sophisticated constructions on the meaning of progression for individuals. These constructions allow for a better understanding of the variables that need to be measured in guidance evaluation systems.
- v. Finally, with regard to the authority of the findings, in contrast to the conventional approach where evaluation data is prescriptive, the constructivist data in this study is not to be viewed as having any special power or legitimacy. Instead, the data represents the voices of two key stakeholders which can be fed into the negotiation process in the design of evaluation systems in adult educational guidance provision.

The final item, (v), is particularly significant as it addresses an important issue that has been largely overlooked in career guidance, and specifically in adult guidance contexts. Namely, the ‘voice of the user’, the client, in the quality assurance process, which relates explicitly in this research study to his/her contribution to the design of appropriate longitudinal tracking systems to measure outcomes.

### *9.3.3 The voice of the client*

The centrality of the client in the guidance process needs to be reflected in the development of a broad range of performance indicators and outcomes for measurement. As discussed in 9.3.2 it may be possible to dispute the endorsement of individualism and objectivity in guidance through the democratic inclusion of the voice of the client in quality assurance processes (Prilleltensky & Fox, 1997:11). In recent years, the inclusion of the ‘voice of the user’ in guidance activities has moved from an abstract to a more concrete concept in the discourse of policy and practice, albeit from differing perspectives.

In the policy discourse the voice of the user, denoted as the ‘citizen’, in the organisation and provision of career guidance services is represented as one of the key principles governing guidance (Wannan & McCarthy, 2005:12). This is described as encouraging a culture of continuous improvement with “regular citizen feedback”, (p.13). However, a stronger argument is being made by many theorists and practitioners for the more democratic inclusion of clients from the bottom (service provision) to the top (policy formation). It is proposed that this would increase the capacity of guidance services to meet the needs of all stakeholders, address barriers in access and progression for clients, enhance quality standards and identify good practice in the field (Plant, H, 2005:2).

On the whole, Henderson et al (2004:29) claim that user involvement is restricted in quality assurance approaches in guidance. Three levels of user involvement have been suggested; individual, service and strategic (Plant, H, 2005:3). The intention of this research study has been to gain an understanding of the purpose and scope of client

involvement in determining quality issues in Irish adult guidance provision. Within the AEGI clients have only been involved in summative evaluation in recent years. At a strategic level it is recommended that the 'voices of users' are engaged in policy formation (NGFa, 2007:24). However, more sophisticated mechanisms still have to be created to achieve this goal. The rationale for engaging five clients in a discussion on outcome measurement, longitudinal tracking and the language of evaluation was to provide a forum for clients to comment on quality assurance issues in guidance that impact directly on users, practitioners, service providers and policy-makers.

Through the engagement of the voice of the client in this research, a number of striking themes emerged in their discourse in relation to the long-term measurement of individual progression. One of the important themes is the value the clients placed on their own personal experiences which they felt was important for guidance providers to recognise. These experiences may be downplayed or neglected if there is no follow-up by adult guidance services post-guidance intervention. A number of the clients stated that mechanisms such as longitudinal tracking systems could serve to legitimise the client's experience by providing insights on the nature of progression and non-progression. In addition, it was important for some of the clients that evaluators gain an understanding of clients' expectations when they seek guidance and the actual reality of their current situations. In terms of outcomes, that reality can be positive or negative based on the decisions they have to make and the obstacles they encounter in their progression paths. The range of outcomes for measurement is discussed in more detail in 9.4.

Another significant theme was the economic language used by evaluators and policy-makers to describe users of guidance services. This proved to be a contentious issue amongst the majority of the clients. Over time, capitalist ideology has become legitimised in discursive practices in guidance. This has led to the commodification of guidance identified by Edwards (2008:22), whereby the clients of Irish adult guidance projects have been reconstructed and given the subject positions of 'customers' and 'consumers' in the discourse on evaluation and quality assurance processes. This

economic discourse is already embedded in Irish guidance discourse as ‘consumers’ of guidance have been represented on the National Guidance Forum (NGF, 2007a:5). As one client stated, there may be an argument for using this terminology if clients are ‘paying for it’. However, as the AEGI is a free service the majority of the clients, apart from James, argued that as they were not ‘buying’ a service and they would prefer to be called *client*.

Furthermore, the clients claimed that the use of this economic terminology was irreconcilable with the discourse of the personal which is represented in the one-to-one relationship between the client and the guidance practitioner. From a postmodern perspective, one client asserted that the discourse of the expert (medical) is given power and legitimisation in its definition and description of people through ‘expert’ language that is far removed from the subjective experiences of clients. Similarly, in guidance, the discursive practice of representing clients as customers and consumers may distance the client from engaging in quality assurance processes in guidance such as longitudinal tracking systems for outcome evaluation.

#### **9.4 Design of Longitudinal Tracking Systems in Adult Educational Guidance**

As explained in previous chapters the earlier REGSA study revealed a number of issues in its attempt to capture the long-term progression of a large cohort of clients (Hearne, 2005). These issues are primarily methodological in nature and form a large part of the discourse on longitudinal tracking in guidance and the findings that have emerged in this single-case study.

##### *9.4.1 Rationale for longitudinal tracking of client progression*

An unambiguous case is presented in education and guidance discourse on the need for investment in tracking mechanisms to generate a greater understanding of the nature of education and career progression for individuals’. From an educational perspective, tracking can address issues of soft outcome verification, systemic inequalities and the implementation of supports for adult learners (McGivney, 2002:25; Lynch, 1999:212).

Similarly, as Bimrose et al (2008:28) claims, longitudinal research in adult guidance can provide insights into individual's career decision-making that can either enhance or inhibit their career progression and development during times of transition.

The findings in this research corroborate Bimrose et al's (2008:88) conclusions that longitudinal research can contribute to an understanding of the process and impact of effective guidance interventions on adult career trajectories. Of particular significance in this smaller longitudinal case study was the emergence of the multiple realities of the clients as each one of them grappled with structural and personal obstacles in their progression pathways. The findings elucidate that career development can comprise a number of the elements identified by Kidd (2006:48) including the construction of unfolding careers over time, decision-making on education and career progression, and career resilience. In particular, the uniqueness of each case supports the argument put forward by Bimrose et al (2008:6) that the measurement of the impact of guidance needs to take account of the distance travelled by clients.

Similar to the guidance process itself, longitudinal tracking also afforded the clients the opportunity to review and assess their career constructions, decision-making, motivations and future aspirations. The clients contributed valuable insights into the rationale for long-term tracking from the client's perspective, as opposed to the evaluators. The clients proposed that longitudinal tracking by adult guidance services can serve to:

- 1) Validate the client's experience by showing an interest in his/her progression through regular follow-up.
- 2) Encourage a reciprocal relationship between the client and the guidance practitioner that encourages participation in tracking activities.
- 3) Re-engage previous clients or introduce new clients to the guidance service.
- 4) Provide a forum for feedback on structural improvements in the guidance service as well as the education sector.
- 5) Contribute to a greater understanding of the issue of non-progression for adults.

- 6) Supply evidence on clients' journeys and the spectrum of opportunities available to other clients accessing the guidance service.

In relation to the final point, some of the clients stated that individual case studies of former clients would serve to encourage prospective learners and career changers who seek guidance. As Patton (2002:236) claims case studies could be used to help illustrate what is typical of the case rather than generalising beyond it. In this situation, Bimrose et al. (2008:91) assert that:

there is significant potential to harness the voice of the user by practitioners gaining consent for on-going follow up activities and securing testimonials on what does and does not work from a user perspective. This, in turn, should influence both training and project development opportunities.

(Bimrose et al, 2008:91)

Nonetheless, evidence from the UK practitioner workshops suggests that the extent and regularity of tracking is inconsistent across the adult guidance sector as it may be 'dependent on accessibility, willingness of client to respond, time, money and resources'. It is also reliant on the structures for tracking in the relevant guidance organizations, such as nextstep, Learn Direct and Careers Wales. In Ireland, the deficiency of established systems to track client progression and monitor long-term outcomes has parallels with current practices in the UK. The lack of a cohesive structure for client tracking across the AEGI services has resulted in the use of a combination of ad-hoc methods to ascertain short-term and long-term education and career progression (SPSS Ireland Ltd., 2005:34).

Comparisons with the Irish and Finnish public employment sector (PES) revealed that the long-term tracking of clients' progression varies depending on departmental policy and the remit of the specific employment organisation. In Ireland, long-term tracking is not a priority for FÁS. As the final outcome is 'entering employment' the FÁS caseload management system (CMS) is not used for longitudinal tracking. However, in the Finnish PES there is a longitudinal focus on clients' progression as the PES's provision includes guidance support from vocational psychologists into education, training and a range of employment activities. Therefore, there is an acknowledgement by the Finnish

PES that guidance encompasses a broad range of activities that need to be evaluated over a longer time-frame.

As the process and impact of guidance intervention can produce a diverse range of actions and outcomes for each client, the incorporation of these elements into a longitudinal tracking system in Irish adult educational guidance raises a number of methodological issues.

#### *9.4.2 Methodological issues in the design of longitudinal tracking systems*

From a process perspective, longitudinal tracking can highlight how evaluations of the impact of guidance are liable to change over time for clients with the benefit of hindsight (Bimrose et al, 2008:81). Likewise, from an outcome perspective, the issue of time is relevant for ascertaining the nature of clients' educational and career progression. As one UK guidance practitioner in the study stated 'timescales for clients reaching goals can be anything from one to ten years possibly'. This significant observation is apparent in the five clients' stories as their progression experiences, goals, motivations and outcomes changed over time since their first guidance intervention. Unfortunately, the range of qualitative outcomes experienced by the clients is currently being overlooked in the need for quantitative outcomes by Irish policy-makers to measure the impact of guidance.

However, qualitative processes are extremely difficult to capture in client tracking systems unless some attempts are made to quantify the subjective nature of progression. Otherwise, the reliance on purely objective outcomes is a form of Foucault's (1982:208) 'scientific classification' which decentres the subjectivity of clients making them objects of knowledge for funders and policy-makers in guidance. This is the practice adopted by the DES to evaluate predetermined outcomes, whereas the evidence in this study suggests that the achievement of outcomes is a multi-faceted and complex process for each individual. A democratic approach to evaluation will require the development of conceptual and operational constructs that define outcomes from the perspectives of all relevant stakeholders including clients. The challenge is to develop a sophisticated

tracking system that has the capacity to measure a broad range of outcomes to reflect the reality of the client’s past and current situation. The empirical data gathered from the clients and practitioners in the study provides a range of hard and soft outcome constructs that could be developed further for a more adequate measurement of progression in longitudinal tracking systems. These are displayed in the matrix *Table 9.3*.

*Table 9.3: Matrix of outcomes for measurement in longitudinal tracking systems*

Hard Outcomes	Soft Outcomes
<ul style="list-style-type: none"> <li>▪ <b>Education/Training:</b> <i>from entry to completion, full-time/part-time/modular/distant/flexible</i></li> <li>▪ <b>Qualifications:</b> <i>level, full/part qualification, accredited/non-accredited</i></li> <li>▪ <b>Employment:</b> <i>full-time/part-time, self-employment, voluntary sector</i></li> <li>▪ <b>Training/Job Placement Initiatives</b></li> <li>▪ <b>Specific Career Change</b></li> <li>▪ <b>Internal Promotion</b></li> <li>▪ <b>Retirement Activities</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Self-concept:</b> <i>confidence levels, self-esteem, self-worth</i></li> <li>▪ <b>Attitude change:</b> <i>open-mindedness, clarity of options</i></li> <li>▪ <b>Choices:</b> <i>education, career, lifestyle</i></li> <li>▪ <b>Personal satisfaction:</b> <i>contentment, achievements, dreams realised</i></li> <li>▪ <b>Agency:</b> <i>personal and structural mobility</i></li> <li>▪ <b>Opportunity awareness:</b> <i>education, training, employment, voluntary</i></li> <li>▪ <b>Wellbeing:</b> <i>health, changes in lifestyle</i></li> <li>▪ <b>Change in circumstances:</b> <i>personal, social, economic, for example, financial.</i></li> <li>▪ <b>Personal relationships:</b> <i>family, friends, work, community</i></li> <li>▪ <b>Goals:</b> <i>present, future, specific</i></li> <li>▪ <b>Skills:</b> <i>learning-specific, work-specific, career management, decision-making, self-management, creative, problem-solving, listening, time-management</i></li> <li>▪ <b>Motivation Levels</b></li> </ul>

As an interpretive exercise the five case vignettes reflect the OECD (2004b:18) viewpoint that career guidance can bring about *immediate* attitudinal changes, *intermediate*

behavioural changes and *longer-term* outcomes. The particularity of each client case emphasises how change is a subjective process which involves a wide range of variables that support or inhibit it. As displayed in *Table 9.3*, hard outcomes can encompass achievements in education, training and employment and reflect the changing nature of these environments and the career choices individuals have to make on a regular basis. The significant changes in Irish adult education provision have seen greater opportunities for adults that can be factored into the measurement of individual progression, for instance, full-time, part-time, modular, distant, and flexible. Likewise, in recent years, opportunities in the world of work have expanded, as well as contracted, forcing individuals to be more mobile and resilient in their participation in the labour market, for example, full-time, part-time, self-employment and voluntary.

Nevertheless, as McGivney (2002:22) argues, hard outcomes and soft outcomes are symbiotically linked as it is often increased self-confidence that leads to ambitious goal-setting and expanded employment opportunities. Therefore, it is often the softer outcomes which have a greater impact on a client's sense of personal progress. For example, Joan's self-worth was low when she first sought guidance but it had increased over time so that by 2009 she did not feel she necessarily had to seek new employment to make her feel more fulfilled. Her personal experiences and her new qualification had given her greater self-confidence and opened up a whole new area of interest that could be used in her teaching career.

As presented in *Table 9.3*, the range of soft outcomes is much broader than hard outcomes. For that reason softer outcome measures need to be developed to assess the long-term psychological, behavioural and social changes experienced by clients. The narratives of the five clients in this study illustrate that these outcomes can include increased self-confidence, discovery of talents, expansion of activities, goal attainment, reduced isolation, and risk-taking. In addition, as Maguire & Killeen (2003:18) assert, measures that reflect identity shifts for clients also need to be accommodated in longitudinal studies as this is often central to the personal development of the client over

time. These measures comprise aspirations, motivation, attitude, personal satisfaction and greater opportunity awareness. Even though quantitative data (hard outcomes) is generally straightforward to evaluate, according to Whiston & Oliver (2005:162) there is evidence to suggest that qualitative outcomes can also be developed for evaluation purposes in career guidance.

Consequently, the findings in this single-case study support the argument put forward by Maguire & Killeen (2003:19) that:

the views, attitudes and aspirations of recipients of guidance are crucial to an understanding of the impact of the guidance process, rather than relying solely on what appears to be the case from 'hard' data, such as take-up, or lack of it, of learning opportunities.

(Maguire & Killeen, 2003:19)

This research proposes that longitudinal tracking systems need to incorporate indicators that reflect the personal and professional growth of the individual as well as the objectives of policy-makers. Furthermore, as the hard and soft outcomes displayed in *Table 9.3* also relate to the three OECD public policy goals of learning, work and social equity at some level the softer outcomes of these three policy goals requires greater explication in evaluation systems. However, a number of additional issues need to be considered in the design of a longitudinal tracking system. These are the use of actions plans and the limitations of longitudinal tracking.

A finding from the observations of the two PES client data management systems which could be applied to the AEGI adult guidance management system (AGMS) was the use of 'client action plans' to measure the client's step-by-step progress during and post-guidance intervention. These client action plans were built into the two relevant data management systems and duly recorded interventions, actions and outcomes which were given to the clients at the end of each session. As the AEGI services do not have such a sophisticated facility on their AGMS client information is recorded both manually and electronically which is time consuming.

One advantage of a built-in client action plan is that the print-out which is given to the client places the responsibility on him/her to pursue decisions and actions discussed in the guidance session. One disadvantage of the monitoring of client action plans in the Irish PES (FÁS) was the accessibility to client data by a number of different stakeholders which raises issues of confidentiality in client data management. This issue was circumvented in the Finnish PES as the vocational psychologist was able to screen out confidential client information recorded in the guidance session. Similarly, the NCGE and DES do not have access to specific client data in the AEGI services.

Conversely, from the practitioner's perspective, the use of action plans to measure outputs may undermine good practice if guidance services have to concentrate on quantity rather than quality in progressing clients on into education and employment. Bimrose et al. (2008:95) state that action plans:

...should be developed as an integral part of a learning process that the client values and owns, rather than as an instrument for practitioners or service delivery targets.

(Bimrose et al, 2008:95)

However, client action plans also have their limitations in longitudinal research and cannot be relied upon to provide a complete reflection of progression from guidance intervention as client's education and career decisions are liable to change over time. In addition, clients may have difficulty in recalling specific actions and decisions negotiated with the guidance practitioner when followed up through tracking. Similar to the Bimrose et al (2008:26) study the issue of human memory in longitudinal tracking emerged in the earlier REGSA study and this case study as some of the clients had difficulty in remembering elements of the earlier guidance intervention. Understandably, the passing of time is a factor to be considered unless tracking is conducted on a regular and consistent basis by the guidance service.

A further limitation is client attrition over successive phases in the longitudinal study. At the close of the fieldwork in 2009 only one client (Owen) had failed to respond to the request for a follow-up telephone interview. Significantly, all of the other four clients

were still agreeable to being tracked in the future. Perhaps this was a reflection of the reciprocal relationship between the client and the guidance practitioner that some of the clients had mentioned in the 2006 individual interviews. This would need to be considered if longitudinal tracking is to be conducted by an ‘insider’ (practitioner) or an ‘outsider’ (consultant) of the guidance service. Another reason for attrition is a change in location for clients over a period of time which is difficult to keep track of unless contact with clients is consistent. This was a significant finding in the earlier REGSA study and also came to light in this case study as Derek had moved to a new house between 2006 and 2009. In his situation, post was re-directed to his new address. In view of the large numbers of clients accessing the AEGI services it is highly likely that there is some degree of mobility which would have implications for longitudinal tracking.

In terms of the long-term benefits of guidance, the range of softer outcomes is evident in recent research studies and the experiences of the clients in this single study. Bimrose et al. (2008:95) state that clients find guidance useful for a number of reasons, such as:

- It provides access to specialist education and labour market information.
- It helps to develop insight, focus and clarification on ideas and options.
- It increases self-awareness, self-confidence and motivation.
- It structures opportunities for reflection and discussion.

All of these themes emerged in the clients’ discourse despite the change of circumstances for some clients at various points in their progression. In particular, increased self-confidence and a new sense of direction were two of the main benefits experienced by all five clients in 2006. Even though Katherine and James had changed direction by 2009 they still felt guidance had been valuable to them and were not adverse to availing of it again or being tracked in the future. Therefore, the softer benefits of guidance such as increased self-confidence, insight and clarification can improve clients’ decision-making as they re-negotiate their earlier choices and consider future options suitable to their needs and circumstances. An appreciation of the importance of these subtler changes for

clients needs to be considered in the development of outcome measures in longitudinal tracking systems.

To conclude, the critical standpoint in this single-case study seeks to challenge the values, assumptions and objectives inherent in adult guidance policy discourse which privileges economic outcomes over personal outcomes as a measurement of progression. The dominance of this powerful discourse in guidance has been an unconscious process that has led to a valuing of individualism and objectivity in the pursuit of the three OECD public policy goals. This is now being challenged vociferously in the field as practitioners and theorists understand the complexities of change for clients which are extremely difficult to capture in the positivist paradigm favoured by policy-makers. As the research has explicated an adequate measurement of longitudinal progression can reflect the changing nature of learning, the career choices individuals have to make on a regular basis and the resultant risks involved in pursuing such outcomes.

The positioning of Irish adult educational guidance within the broader discourse of lifelong learning to support our economic competitiveness now requires the AEGI services to be accountable for their provision within the context of these three public policy goals. However, the focus on purely quantitative outcomes to measure long-term individual progression is a form of scientific classification that diminishes the multiple realities and the subjective experiences of clients. A greater consideration needs to be given to methodological pluralism in the evaluation of both the short-term and the long-term outcomes in Irish adult guidance provision. Furthermore, the valuable contribution of clients and practitioners to the design of quality assurance mechanisms should be acknowledged and developed further in the field.

Finally, if longitudinal tracking is to become more prevalent as an evaluation tool for impact assessment there is a strong likelihood that quantitative methods (surveys) will be favoured over qualitative methods (case studies, interviews) because of time, cost and human resource constraints. However, as the findings in the study show, the

development of a broad range of hard and soft performance indicators from empirical data, rather than presumptive data, can go some way towards the quantitative measurement of a concept (progression) that is qualitative in nature.

## **9.5 Conclusion**

This chapter has provided a critical interpretation of the discourses in adult guidance on the topic of measuring progression in longitudinal tracking systems from a bottom-up single-case study approach. This has been achieved through the lens of critical discourse analysis (CDA) to interpret the textual, discursive and social practices in the field. The interpretation from the data findings and the literature concludes that the democratic inclusion of the client in the quality assurance process can lead to a greater understanding of individual progression and its long-term measurement. Methodologies for the analysis of the impact of guidance must be derived from empirical data grounded at the level of the client, rather than presumptive outcomes proposed by policy-makers which may be far removed from the realities of clients' lives and their ever-changing circumstances. Chapter 10 concludes the research study and makes recommendations for future practice.

## **Chapter 10: Conclusion**

### **10.0 Introduction**

This chapter provides a conclusion to this interpretive single-case study. The chapter presents an overview of the findings in the context of the research aim and objectives. It provides a SWOT analysis that addresses the strengths, weakness, opportunities and threats of the study. The chapter also proposes a number of recommendations in relation to the findings of the study. It concludes with a reflexive analysis of the research process from the perspective of the practitioner-researcher in the field.

### **10.1 Overview of Findings in the Context of Study Aim and Objectives**

The overall aim of this research study was to consider the development of a best practice framework for the longitudinal tracking of client progression in the Adult Educational Guidance Initiative (AEGI). In order to address this, the primary research question sought to identify how individual progression is currently measured in the AEGI's adult guidance management system (AGMS) used to monitor progression. This required a critical analysis of the discourse on the construction of individual progression in the field, and an examination of the current methods used to measure it in adult guidance provision. This was achieved through a number of key objectives. The objectives involved:

- 1) An examination of the definitions of progression from the standpoint of three relevant stakeholders (clients, practitioners and policy-makers).
- 2) An investigation of the long-term experiences of a number of adults who had received guidance intervention in an AEGI service.
- 3) An assessment of the rationale and methodological issues involved in the measurement of individual progression in longitudinal tracking systems in adult guidance practice.
- 4) An exploration of the client's contribution to the design of a quality longitudinal tracking system in the AEGI for quality assurance purposes.

The answer to the primary research question is that the current positivistic method used by the DES to measure the long-term progression of clients within the AEGI is inadequate and deterministic as it neglects to capture effectively the personal development of clients. This interpretive study has helped to explain the limitations of using a positivist methodology in adult guidance monitoring systems to measure a concept that is subjective in nature. The variations in the client narratives illuminated contextual factors, unpredictability of human behaviour, career decision-making processes and the client's sense of agency which cannot be captured using a linear and objective approach. However, the current discourse on outcome measurement in adult guidance is part of a broader discourse in guidance and relates to the benefit of guidance for a range of stakeholders. These stakeholders include clients, practitioners, educators, employers, policy-makers and society at large.

A critical constructivist approach in the study has helped to unmask the dominant value assumptions of policy-makers in their top-down approach that privileges certain interests over others in the measurement of outcomes. This can be found in the DES's prioritisation of education and employment outcomes over personal outcomes in its system of client monitoring. The research finds that this type of scientific classification disregards the subjectivities of clients and makes them objects of knowledge in government monitoring systems.

The research shows that the longitudinal tracking of individual progression is a complex and contested issue in guidance practice and policy. The findings from the three data sources were representative of the noticeable tensions in the discourse in previous research. Fundamentally, in support of previous research, this study has shown the difficulty of reaching a concise definition of progression as it means different things to each individual. Progression as a personal construct is subjective and context-specific. As a consequence, the process of education and career progression for adults may not be vertical or linear, as is the assumption in Irish policy discourse. Progression can change over time as adults have to manage their careers through continuous life transitions.

However, the secondary analysis of Irish policy documents indicates that policy-makers disregard the multiple realities of clients, favouring standardised and measurable parameters of progression. Evaluators need to understand that progression can take a long time for individuals and standardised measurements may not be suitable for the range of target groups within the AEGI.

The research findings highlighted the fact that the support of adults in their progression requires a greater commitment from the key stakeholders in adult guidance and education policy-making. This would involve improvement in measures to dismantle the personal and structural obstacles that hinder their progress. Although previous research found that the financial obstacle prevents a large proportion of adults from progressing through education, this research highlighted an equally prevalent number of other constraints. In structural terms, these obstacles were found to be a lack of flexibility in higher education for adult learners and suspension of programmes post-selection of participants in third level. Although some personal obstacles are outside the remit of providers, the research found that adult learners often need learning supports such as subject specific interventions to cope with the transition onto third level programmes. Furthermore, a lack of awareness amongst adult learners of relevant institutional supports can perpetuate difficulties with their learning and progression.

The findings show that even though hard outcomes such as achievements in education and employment are very important, the softer outcomes related to personal development are a significant element in the measurement of the long-term progression of clients. Quite often it is the intangible outcomes that have contributed to the client's personal, social and economic progression. In addition, as adults' priorities and aspirations change and economic contexts can influence their decisions, anticipated outcomes are bound to alter and be reconstructed over time.

Currently, in the policy discourse the rationale for evaluating outcomes is related to the achievement of the three OECD public policy goals and the maintenance of economic

competitiveness. However, from the perspective of the practitioners in the study, this creates a target-driven culture where quantitative outcomes, cost-benefit analysis and higher levels of accountability can undermine professional practice. From the clients' perspectives, accountability needs to be balanced with appropriate methods to evaluate their individual experiences over time.

The need for methodological pluralism to measure individual progression and evaluate the long-term outcomes of guidance intervention emerged in the findings. Qualitative data cannot be overlooked in the pursuit of quantitative outcomes. Specifically, longitudinal tracking mechanisms could combine quantitative and qualitative methods to include surveys, interviews and case studies. The findings show that quantitative methods of tracking need to incorporate empirical data, rather than presumptive data, to reflect adequately the subjective nature of progression. Furthermore, case studies can serve as models to support clients in their education and career development, contribute to professional practice, and inform guidance and education policy-making.

A compelling finding in the study was the centrality of the client's voice in the discussion on QA mechanisms in adult guidance practice. In relation to purpose and scope of user involvement, the findings support the inclusion of clients at the individual, service and strategic level in the AEGI. The contribution of the clients in this research highlights how users of the AEGI have a role to play in shaping services that directly impact on their lives. In specific terms, the findings demonstrate that the design of longitudinal tracking systems can be further advanced by an understanding of the client's perspective of the process. The clients in the study argued that tracking could be viewed as a reciprocal process due to the nature of the client-practitioner relationship. As clients' experiences are valuable and legitimate, a lack of consistent tracking by guidance providers can only serve to ignore and downgrade these personal stories. At a service and strategic level, a greater understanding of the expectations of clients and the actual realities of their lives post-guidance intervention can contribute to service improvement. This is particularly significant as our changing economic position is generating an

increased demand for guidance intervention. Within this context, lifelong guidance will become even more relevant and guidance services will be required to adapt to changing demands from citizens.

Finally, in the discourse on evaluation the marketing terminology used to describe users of guidance ought to be re-configured. The current economic model that represents clients as customers and consumers may discourage clients from engaging in tracking or other quality assurance measures if guidance is seen as a commodity rather than a helping intervention.

## 10.2 SWOT Analysis of Research Study

This section will provide a SWOT analysis of the research study. A SWOT analysis relates to the strengths, weaknesses, opportunities and threats of the research as displayed in *Figure 10.1*.

<b>STRENGTHS</b> <i>Contributions of research</i>	<b>WEAKNESSES</b> <i>Limitations of research</i>
<i>Validity Issues</i> <b>THREATS</b>	<i>Implications for Practice, Policy &amp; Research</i> <b>OPPORTUNITIES</b>

*Fig. 10.1: SWOT analysis matrix*

### 10.2.1 Strengths: contributions of research

This research can make a methodological and theoretical contribution to adult guidance in Ireland. The AEGI is still relatively new in Ireland and has been experiencing a number of developmental changes related to quality provision to its clients. The findings

from this study can contribute to the development of appropriate evaluation methodologies and enhance theoretical perspectives on long-term outcome measurement in the Initiative. Furthermore, as the literature and previous research points out, the need for evidence-based research is now a priority in adult guidance policy discourse. This requires greater advancements in the field which can only be achieved through the creation of new knowledge on appropriate mechanisms for longitudinal data collection.

From a methodological perspective, this research study confirmed the need for more interpretive studies to be carried out in adult guidance research. The theoretical limitations of the positivist paradigm have already been identified in guidance research by Bimrose (2006:6). The use of a case study methodology helped to explain the causal links in guidance intervention and individual progression in a descriptive mode (DePoy & Gilson, 2008:192). The single-case design contextualised the topic of individual progression allowing it to be representative, typical and revelatory in its uniqueness.

This study is underpinned by a constructivist paradigm that brought to the forefront the client's concerns, subjective experiences and contextual situations in the meaning-making process. This provided greater illumination on their progression over a long-term period. Schwandt (1998:221) argues that knowledge is constructed or made, as opposed to discovered, in order to make sense of experience. However, a range of discovery processes emerged in the clients' stories that can challenge this viewpoint. Over time, all five clients had discovered talents, interests, abilities and individual strengths to deal with obstacles in their progression. In addition, a range of complex variables emerged in the empirical data such as age, gender, roles, self-concept, personal and structural obstacles and mobility which are difficult to capture through positivist approaches.

One suggestion from the clients was the use of client case studies to serve as models of encouragement and support. The five case vignettes highlighted the subtlety and complexity of each case in its own right, affirming the value of a case study approach to provide greater understanding of an individual's unique experience. The use of a

qualitative, longitudinal case study approach to evaluate the impact of guidance for adults in England has already been employed by Bimrose et al. (2008:1). This study confirmed Bimrose et al's findings that the guidance process can be effective in supporting adults' long-term education and employment progression. However, this study made a further contribution in the sense that it proposes a democratic constructivist framework, based on Guba & Lincoln's (1989:50), which integrates the viewpoints of two key stakeholders, the client and the practitioner, in the evaluation of long-term outcomes. It is anticipated that the inclusion of a wider range of stakeholders can evolve from the propositions in this study.

In addition, this explanatory case study made a further methodological contribution through its adoption of a critical constructivist paradigm to interpret the discursive practices in adult guidance from three different positions. The critical methodological framework revealed the values, assumptions, ideologies and power relations embedded in the discourse on evaluation. As a challenge to the dominance of the positivist paradigm in guidance practice and policy-making, a critical approach supports the argument for a dialectic between individual agency and structural determinism put forward by Rogers (2004:3). As Usher (1996:24) asserts, adult guidance research must involve *praxis* if it is to support the advancement of human understanding and communication in the field. This can be addressed through the embracing of different worldviews and methods in the design of evaluation tools to improve professional practice.

Since this study corroborates and develops further theories underpinning career guidance phenomena, its findings are of theoretical value from a number of aspects. Swanson and Fouad (1999:3) state that a theory is "a series of connected hypothetical statements designed to explain a particular behaviour or set of behaviours". In terms of a theoretical contribution, this research study supports and develops theories on adult career decision-making, development and progression. The research evidence can serve as a vehicle for generating theory on adult career development which in turn can inform adult guidance practice, policy-making and research in Ireland.

Hypothesis testing in the field of career guidance has attempted to evaluate a number of assumptions about career behaviour (Herr et al, 2004:623). These assumptions are:

- 1) Career development is continuous and longitudinal.
- 2) Career development involves a number of development tasks over the lifespan.
- 3) Career development and personal development are interrelated.
- 4) Certain interventions can influence or modify career development over time.

The findings in the study uphold these suppositions and offer insights into the career development of Irish adults across the life-span. A multiple method approach provided a greater understanding of the phenomena under investigation which led to the emergence of an explanatory theory of individual progression. The study has revealed how guidance intervention can influence adults' career development over a substantial period of time. It has also revealed the significance of personal development in the client's career development. Nonetheless, the study has also challenged the assumption that career development may be continuous and longitudinal for all adults by explicating that individuals make choices along the way that may not necessarily have a career outcome.

Postmodernist perspectives which have influenced career theory in recent years stress the importance of conceptualising career development in non-linear terms. The study supports McGivney's (2002:15) view that progression is a subjective process and individual's progression paths can be non-linear, cyclical and zig-zag in different directions. In addition, the study has revealed how the historical pasts of clients are brought to the guidance process and can influence their outlook about progression. The relevance of their previous experiences to future decision-making and choices cannot be underestimated in the guidance intervention process and the long-term measurement of outcomes.

As a challenge to the long-standing psychological position in career theory, the study has revealed how clients can become more socially mobile in occupational terms through a qualification and new career. The research also supports Kidd's (2006:49) supposition

that personal and structural constraints can hinder progression, requiring creative coping strategies and high levels of emotional resilience which is neglected in career theory. Additionally, the emergence of a new career decision-making style in the study (circumspective) contributes to theory to the extent that it provides an understanding of the judiciousness required by adults who have to make major changes in their lives. From a developmental perspective, Csikszentmihalyi's (2002:6) theory of 'optimal flow' has relevance for guidance intervention and the clients' achievement of personal dreams.

This study also contributes to the existing body of literature on adult career development and progression. In particular, theoretical links between the longitudinal tracking of progression and personal development concepts such as *progressive readiness*, *reciprocity process*, and *legitimacy of experience* provide additions to the evidence base and enhance knowledge on the topic. Furthermore, the research findings can augment the slowly emerging theory in the field on the involvement of the user in the development of guidance services. In theoretical terms, the research has revealed the client's contribution to service improvement and the political awareness that citizens bring to discussions on quality assurance in public services. In addition, their discourse on the issue of marketing terminology in quality assurance counteracts the reconstruction of 'clients' as 'customers' or 'consumers' in contemporary guidance policy discourse. An example of this terminology is found in the OECD document (2004b:135). This issue could be examined further through the client's participation and contribution at the wider strategic level of planning, developing and reviewing of services.

Lastly, while this research was conducted in one AEGI service, it attempts to reflect a wider vision of the experiences of clients across the AEGI and further afield. The study has explicated from a number of perspectives the issues involved in longitudinal tracking in adult guidance contexts. It has revealed adults' career development and decision-making processes over a period of time in a changing economic environment in Ireland. These theoretical findings can provide new knowledge in the development of a client tracking system not only in the AEGI but within other Irish guidance contexts. A greater

understanding of such processes can add to new knowledge as indicated by the National Guidance Forum (2007a:21).

### *10.2.2 Weaknesses: limitations of research*

The special features of this interpretive single-case study have presented certain limitations in its usage (Merriam, 2001:42). The limitations within the study will be considered here and in section *10.2.4*. The specific limitations are:

The use of a pluralistic approach in the data collection and analytical methods used in the study might be considered a limitation as multiple methods can open up possibilities of discrepancies and disagreements (Robson, 2002:175). Nonetheless, the integration of a number of methods was deemed necessary as the research progressed through different stages requiring greater elucidation on the topic from supplementary sources.

The limited generalisability of the findings from the qualitative aspects of this study is acknowledged. However, even though generalisability is problematic in naturalistic research, a large scale quantitative study may not have captured the complexity, uniqueness and context specific nature of human behaviour in relation to the topic under investigation (Cohen et al, 2007:137).

This qualitative single-case study is limited by my own integrity as the primary instrument of data collection and analysis in the site of my former employer (Merriam, 2001:43). My closeness to the clients and the staff of REGSA may be deemed a limitation in the study. However, it provided a greater understanding of the context specific nature of the study, as well as engendering a self-reflexive awareness of the ethical implications involved in the research process. Strategies to address this involved the use of an ethical framework, empathic neutrality and reflexivity in the research process.

The choice of research site (REGSA) provided another limitation in the research. The decision to sample participants from the previous REGSA study (2005) provided some constraints in the study as the target population for selection numbered eighteen in total. In general, it appeared that clients who had a positive experience of guidance agreed to further research in this follow-up study. Therefore, the study is limited in its attempts to capture negative experiences of guidance intervention. Nonetheless, through a longitudinal analysis it did explicate how clients' experiences of education and career progression can be both negative and positive which may not be obvious during the selection phase.

The selection of a small cohort of clients for interview to form the bulk of the research is an acknowledged limitation of this single-case study. This was a strategic decision and did not result in premature closure in the fieldwork. The participants were followed up at a later stage using another interview method which enhanced the longitudinal aspect of the study. However, despite the necessary strategies to address the limitations of qualitative interviews in this study, the interviews are open to critique for their lack of standardisation and the possibilities of researcher and respondent bias.

Although the intention was to sample at least one client from the four AEGI target groups (i.e. literacy, VTOS, adult and community education and others), this was not feasible with a small target population. In addition, excluding Katherine, all of the clients interviewed were of Irish nationality. Therefore, issues related to specific target groups and clients of other nationalities warrants further research.

The combining of textual and content analysis techniques is also a limitation. Textual analysis of the client interviews can raise concerns about researcher bias and its ability to capture client's subjectivity adequately (McLeod, 2001:117). The selection of Irish policy documents for content analysis is also open to claims of researcher bias and the imposition of meaning (Cohen et al, 2007:490).

Finally, this research project is relatively limited in scope and has had to fit the realities, time and resources available to me as a singular researcher in the field (McLeod, 1999:8).

### *10.2.3 Opportunities: implications for practice, policy and research*

The findings from this research have implications for practice, policy and research. An aspiration of the research is to contribute to the advancement of adult guidance practice in Ireland. The research question was born out of my own personal experience as a guidance practitioner, and my inquisitiveness into the nature of long-term progression for clients of the AEGI which I believed was being overlooked in practice. Therefore, the goal has been to produce knowledge that makes a difference to guidance practice by enhancing understanding of the impact of guidance interventions and the meaning of progression for clients. In particular, this research can be viewed as a form of praxis in its challenge of the technical-rational approach currently favoured by the DES to measure outcomes in adult guidance provision.

The DES (2000:156) states that adult guidance and counselling involves a wide range of activities to support clients that are both objective (education and employment attainment) and subjective (personal development). However, the personal development outcome is given insufficient recognition in the DES's administrative, top-down model of monitoring within the AEGI. The NGF (2007a:21) stresses that "assessment and evaluation of the quality of guidance should be balanced and include personal/social, educational and vocational aspects of the service". This research has revealed that all of these aspects are now central to the measurement of client progression in the AEGI and need to be integrated into a quality longitudinal tracking system in the Initiative. This requires a fundamental change at both a service and strategic level which would have direct implications for service providers and practitioners in the field.

Nevertheless, Bimrose et al. (2008:57) state that change in practice involves "reconciling the constraints placed by the scarcity of resources on practice and the real, rather than imagined, needs of clients". The focus of the economic value of guidance now means

that there is growing pressure on adult guidance services to justify investment in their provision through quantitative outcomes. Although this is not a major issue in the AEGI at the moment, it would appear that quantitative outcomes are easier to measure, to the detriment of qualitative outcomes. As the thirty-nine AEGI services are now required to support adults in their education and career progression and monitor their progress accordingly, quantitative data only provides a snap-shot of the impact of interventions.

It is now advocated that continuous quality improvement of Irish guidance services needs to be pursued through qualitative and quantitative methods (NGF, 2007a:21). This research has revealed that quantitative outcomes are insufficient measures of progression, and that qualitative evaluation methods can provide a broader range of soft outcome data in the measurement of individual progression. In particular, the empirical data gathered from clients in this research corroborates Bimrose et al's (2008:58) analysis that the concept of *distance travelled* needs to be "accepted, respected and integrated into service delivery, both by practitioners and their managers at different levels".

The findings of the study suggest that there are particular challenges for Irish guidance practitioners, service managers and the National Centre for Guidance in Education (NCGE) if longitudinal tracking is to be undertaken in the AEGI on a consistent basis. Specifically, in relation to the collection of client data and feeding it back into the AGMS the issues include cost, human resources, and staff training within an already budget-constrained sector. Furthermore, the inclusion of a broad range of soft outcomes and attempts to capture the distance travelled by clients would require a re-design of the AGMS.

A further implication of this study relates to the need for a multi-disciplinary approach in the use of appropriate guidance paradigms in Irish guidance practice. The matching paradigm has influenced practice for many years in Ireland. Nonetheless, recent paradigm shifts have focused on the role of lifelong guidance to help individuals develop a range of competences to manage their learning and career paths within a context of

increased economic vulnerability (Sultana, 2008:16). The continuing professional development of Irish guidance practitioners needs to include exposure to other approaches such as constructivism and critical theory to examine the paradoxes and contradictions of our practice. A major paradox is the non-directive and progressive focus of our work with clients, and the quantitative measurement of our provision by funders and policy-makers pursuing social and economic objectives. Such complexities raise issues related to ethics and power relations within the profession that require critical reflexivity in our everyday practice.

The adoption of a critical position midway in this research was a strategic decision as analysis of the literature highlighted a lack of critical engagement in current Irish adult guidance discourse at the interface between practice and policy. Criticality is now gathering power within international guidance discourse as a challenge to the scientist-practitioner model and the purposive rational application of techniques used to monitor the impact of interventions. As career counselling has a powerful influence on individuals' lives guidance practitioners need to be reflexively aware of their own discursive practices (McIlveen & Patton, 2006:24). This is pertinent within the context of the interweaving of the lifelong guidance paradigm with the lifelong learning paradigm which has gained credence in Irish guidance policy discourse in recent years.

In terms of policy implications, the findings from this applied research study may have a limited impact on Irish adult guidance policy overall (Robson, 2002:525). Irish guidance practice is now operating within a national and international policy landscape that necessitates a closing of the gap between the delivery of career guidance services and the goals of public policy (OECD, 2004a:6). Policy can influence career guidance practice through strategic leadership, evidence-based data, legislation, quality standards and strengthening the consumer's voice (OECD, 2004b:123). Despite the limited impact of career guidance research on policy-making, there is now a call for more evidence-based data to inform policy formation (p.127).

Cohen et al (2007:46) state that the relationship between educational research and policy-making is complex as “a piece of research does not feed simplistically or directly into a specific piece of policy-making”. Conversely, Stake (2005:46) argues that case study can be a disciplined force in setting public policy, as vicarious experience is an important basis for refining action options and expectations in evaluation and educational policy-making. In terms of measuring programme impact, Rist (1998:413) argues that “qualitative research provides a window on the program that is simply not available in any other way”. Therefore, from a policy perspective, the aim of this single-case study is not to exaggerate the situation under investigation, but instead to present a microcosm of the vicarious experiences of recipients of policy decision-making, the clients themselves. Furthermore, the study has accentuated the important role of the user in the design of a quality assurance mechanism in the AEGI. The input of clients at a strategic level is warranted at this point in time in Irish adult guidance practice.

In the context of future research in guidance, the implications of the study’s findings relate to methodological and theoretical issues. A number of practical recommendations in relation to research in Ireland are presented in 10.3. From a methodological aspect, the multiple method approach of the study may be used in related fields. As this research focused on outcomes of guidance only, research into processes of guidance intervention that involve both practitioners and clients is one area that warrants further attention. In relation to user involvement, an expansion of this study might involve an action research approach to develop practical strategies, such as client action plans, towards change in service delivery. The limitations of the study also identified specific areas related to AEGI target groups and multicultural guidance for further investigation.

From a theoretical perspective, this study provided greater illumination of the progression of a number of clients who pursued third level education. Further research on the tracking of a broad cohort of mature students in third level would provide greater insights into their personal experiences. Moreover, the research has only revealed one aspect of the user’s contribution to service improvement in adult guidance. This requires further

elucidation from the perspective of other Irish stakeholders such as practitioners, educators and employers. Finally, issues related to the position of practitioner-researchers in the field which have been addressed in this study can be developed further within other guidance, educational and employment contexts.

#### *10.2.4 Threats: validity issues*

A major issue of this interpretive single-case study is the trustworthiness and credibility of the research and its findings. In applied fields such as education and career guidance trustworthiness is especially important as practitioners intervene in people's lives (Merriam, 2001:198). Validity and reliability concerns were approached with careful consideration during the study's conceptualisation, the data collection, analysis and interpretation, as well as the presentation of the findings in the case study (p.199-200). A five-point criterion framework was used to address specific threats related to reactivity, respondent bias and researcher bias and enhance rigour in the fieldwork (Lincoln & Guba, 1985:25).

The issue of credibility (internal validity) was addressed through prolonged engagement in the field between 2005 and 2009 which involved persistent examination in supplementary guidance settings (observation visits) and triangulation of the data sources (clients, practitioners, policy-makers). As the study examined individuals' constructions of reality through observation and interviews, internal validity is to be found in an understanding of the perspectives of those involved, the uncovering of the complexity of human behaviour within a certain context, and a holistic interpretation of what is happening in relation to the research topic (Merriam, 2001:203).

Generalisability (external validity) can be achieved through transferability in this single-case design. The emphasis in the study lies in the attention drawn to the particular case itself and what can be learned from it rather than statistical forms of generalisation (Yin, 2003:10). The specific characteristics are its local groundedness, richness and use of thick descriptions to interpret the views of clients. Therefore, it is intended that the

findings from this single-case study are typical and will have relevance and application to other contexts such as other AEGI services.

Dependability (reliability) and confirmability (objectivity) have been addressed through the self-reflexive activity of auditing. Throughout the research process an audit trail of methods, data analysis and decision-making have been recorded throughout the body of the thesis, three research diaries, a research protocol framework and an electronic memo diary. Furthermore, consistent with a relativist ontology and the political implications of this research, a fifth criterion (authenticity), identified by Seale (1999:46), was addressed through data triangulation to represent a range of different realities.

In addition to these five criteria, member checking of the client transcripts proved to be a valuable and worthwhile exercise. Not only did it provide clarity of understanding and meaning in the form of subjective corroboration, it also produced additional data from some of the clients that enhanced the study's findings.

Finally, an ethical stance has been adhered to throughout the research. In particular, my position as an 'insider' practitioner-researcher raised specific issues of power and bias within the study. To counteract this, I tried to maintain a neutral, empathic and non-judgmental approach. As a practitioner-researcher I have employed reflexive self-awareness and been cognisant of the moral and ethical issues associated with my dual position throughout the research process. Wherever possible I addressed such dilemmas through deliberative decision-making so that no harm came to the participants involved in the study.

### **10.3 Recommendations**

In the consideration of a best practice framework for the longitudinal tracking of client progression within the AEGI the key recommendations are:

*A strategic re-examination of the current methods used to measure and track client progression within the AEGI.* This needs to involve the consideration of a longitudinal

system that adequately captures both the hard and soft outcomes of guidance intervention for clients. It is recommended that a wide range of both types of outcomes are developed to measure the distance travelled by clients. These outcomes should encompass constructs related to clients' economic, social and personal progression as displayed in *Table 9.3* (Chapter 9).

*The re-design of the current adult guidance management systems (AGMS) used in the AEGI to incorporate the aforementioned outcomes.*

*The suitable training of AEGI staff in the management of client monitoring systems.* This training needs to include areas related to the administration, collation, record-keeping, and dissemination of client outcomes in an ethical manner.

*A consideration of the use of client action plans in the AEGI as a medium to record and track client progression.* There is also the proposition that client action plans can empower clients to take greater responsibility for their actions in relation to short-term and long-term career planning.

*The enhancement of longitudinal tracking at a service level needs to fully engage clients in this reciprocal process sooner rather than later.* At a service level, this might be addressed at the outset of guidance intervention when proforma agreements for client follow-up could be discussed with the client. Although this was criticised by some of the UK practitioners in the study, its introduction on a trial-basis might serve to determine the value and practicalities of its implementation in practice.

*The adoption of a democratic, inclusive approach at a strategic level in guidance.* This would assist in dealing with the complexity and challenges of building an evidence-base for outcomes in the AEGI. In terms of quality assurance (QA), this requires the involvement of all relevant stakeholders, as in clients, practitioners, managers, educators, employers and policy-makers.

*The participation and contribution of clients in adult guidance policy formation.* This would require a defined role for the client in the planning, development and reviewing of guidance services.

*A closer examination of the discourse used to describe users (clients) in the evaluation of guidance.* The current emphasis on marketing mechanisms favours an economic model rather than a helping model which may serve to distance clients from the QA process.

*Greater recognition, development and investment in support mechanisms to alleviate the personal and structural barriers that clients encounter in their education and career progression.* This is now required from key decision-makers in guidance and education at a local and national level.

In addition to these nine recommendations a further three subsidiary recommendations are offered in relation to continuing professional development and research in guidance in Ireland. The three additional recommendations are:

*The promotion of empirical research.* Whilst the valuable work of the NCGE is acknowledged here, there is still a dearth of evidence-based research in the guidance sector in Ireland. An increase in the promotion of empirical research activities is required through the development of a research centre dedicated to guidance research in Ireland.

*The establishment of a national guidance research forum website.* Allied to the previous recommendation, the establishment of a national guidance research forum website to promote and disseminate research activities is a requirement to support practitioners and researchers in their work. Similar models are the National Guidance Research Forum (NGRF, UK), the European Guidance and Counselling Research Forum (EGCRF) and the International Centre for Guidance Studies (iCeGS).

*Dissemination mechanism for research into guidance.* The development of other suitable mediums to disseminate guidance research activities at postgraduate, practice and research levels would enhance evidence-based practice and professional development in Ireland.

#### **10.4 Reflexivity**

A self-reflexive approach has been adopted throughout this study which has required me to examine my own subject position at various points throughout the research journey. Initially, it was my passion for the topic of the assessment of client progression which led me to researching it at a much deeper level. Having worked in REGSA for a number of years I was uneasy about the conventional top-down approach for evaluating outcomes employed by the DES within the AEGI. I felt this approach was limited from the perspective of both the client and the practitioner. I believed it failed to capture adequately the complex nature of individual change and progress experienced by clients and the person-centred nature of our work. I also ascertained from informal discussions with other AEGI practitioners that there was a general agreement about these limitations. However, due to the large numbers of clients in the AEGI services, and budget constraints, other methods for the measurement of progression were not being considered.

Therefore, I came to the research with a set of assumptions about the clients' experiences, how these experiences ought to be measured within the AEGI, the policy position of the Department of Education and Science (DES), and my role as a former Guidance Counsellor in REGSA. Havercamp (2005:152) states that as helpers we need to reflect on our position, values and assumptions and our relationships with participants. During the course of the research I was required to stand back and 'bracket-off' my own values and assumptions as I engaged with the clients, met practitioners on the ground, observed other adult guidance sectors, reviewed the literature and current Irish policy informing our practice. As I moved through the research, I came to feel on the periphery of my profession, like an outsider looking in. At times I found this to be a lonely position as I

became more removed from everyday practice. Nonetheless, it was also valuable as it afforded me the opportunity to be more objective and critical of developments in Ireland within the broader landscape of European and international practice and policy.

In addition, reflexivity in an interpretive study can make the researcher humble. Certainly, some of my own personal understandings of the issue of progression measurement were changed as I engaged with clients, practitioners, and those involved in policy decisions through attendance at international conferences. Interviewing the clients over a period of time confirmed to me the courage and uniqueness of individuals who come to guidance in order to make some kind of personal change. What was particularly illuminating in the research was the valuable contribution the clients made to the topic of longitudinal tracking in adult guidance. As policy discourse can be disparaging in its evaluation of individual progression, the discourses of the clients and practitioners confirmed my belief that more democratic approaches need to be introduced in the development of impact measures in adult guidance.

Over the course of the four years of this research study, adult guidance practice has become more deeply embedded in adult education provision in Ireland. It has also developed a stronger voice in guidance discourse, especially within the context of an integrated framework for lifelong guidance in Ireland. The assimilation of adult guidance into mainstream adult education occurred during an economic boom in Ireland. More recently, the economic downturn has been impacting on adult guidance provision as greater numbers of adults seek assistance from the AEGI services. Consequently, the longitudinal tracking of client progression may not be a priority for the services as they cope with an increased demand from clients and tighter funding budgets. Nonetheless, at a strategic level, guidance may still have to prove its economic worth for continuing investment in the sector. This will require evidence of the longer-term impact of interventions and the ultimate outcomes achieved by individuals through longitudinal studies in the field. I remain firm in my belief that the collection of evidence-based data

needs to be person-centred, fair and equitable, and reflect the personal, social and economic progression of our clients.

### **10.5 Conclusion**

This chapter has provided a conclusion to this interpretive research study through a discussion of the findings in the context of the research aim and objectives. It has addressed issues related to the study's validity, limitations, methodological and theoretical contributions and implications for future practice. In addition the chapter has put forward a number of recommendations for future developments in the field of adult guidance in Ireland. Finally, a reflexive analysis of my position as a practitioner-researcher in the field has brought the study to a close.

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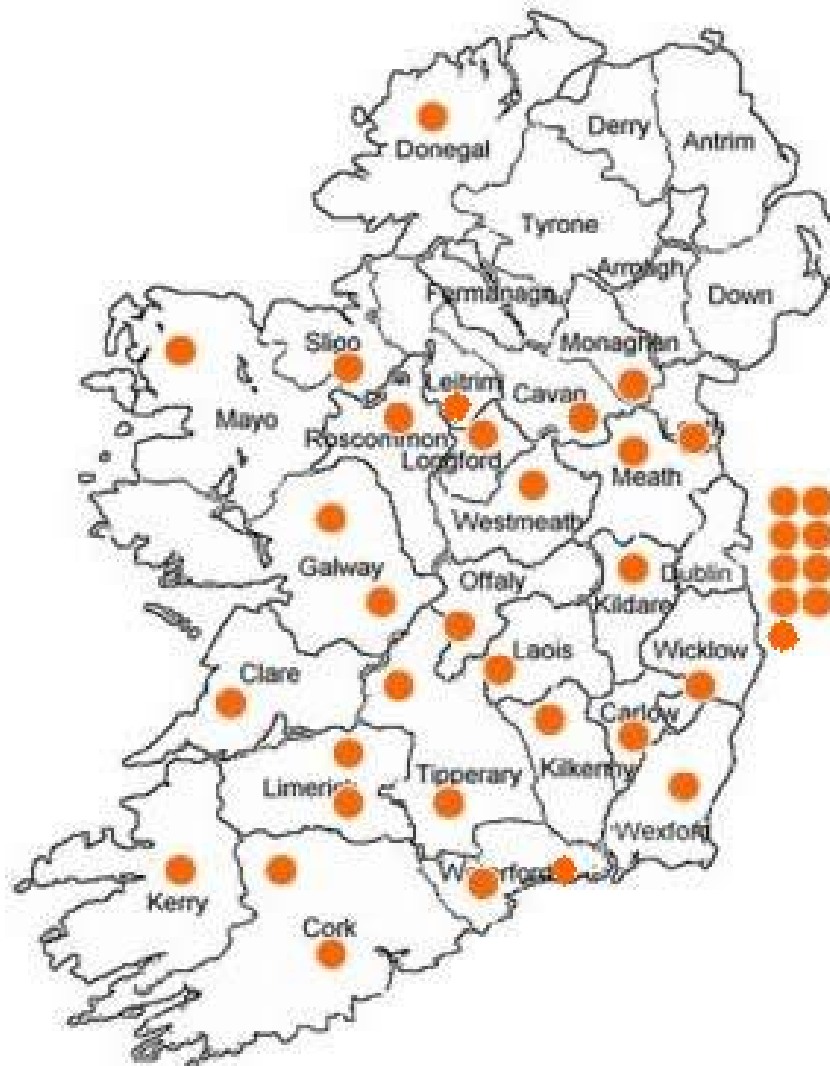
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## Appendix A: National map of AEGI provision



## Appendix B: Review of reports

### Literature table of career guidance reports reviewed

<i>Report Title</i>	<i>Author/s</i>	<i>Country, Purpose</i>	<i>Key Points and main findings to note</i>	<i>Supports and gaps related to research topic</i>
<b>Purely Quantitative</b>				
<i>1. The Impact of Careers Guidance on Adult Employed People.</i> (DfES, Policy Studies Institute, 2000)	Killeen, J. White, M.	<b>England</b> Primary research on long tracking of guidance outcomes in employment context. Clients & non-clients.	Extensive longitudinal study of adult employed people using a comparison group method (those who did not receive guidance). Valuable because of its scale and method (referred to frequently in literature). Quantitative & qualitative methodology used.	Does not address unemployed adults or adult returnee's to education. Focus is on guidance and employment outcomes only; education/training, job satisfaction, earnings and work progression.
<i>2. AEGI Strengths Challenges Opportunities and Threats (SCOT) Analysis.</i> (SPSS Ireland Ltd. 2005)	SPSS Ireland Ltd.	<b>Ireland.</b> Primary research report of AEGI activities from 2000 to 2004. (Phases I to III) to inform policy for Phase IV funding. AEGI staff only.	Interim report only on AEGI activities. SCOT showed staffing levels was major issue. Top three recommendations for AEGI were; increase funding, increase staffing levels and expand current priority target groups. Mentions a 2004 Report of the External Evaluator! <i>Is this available?</i>	Statistical data only - by independent statistical analysis company in consultation with NCGE. No qualitative methodology. Clients not involved in this interim report. Difficult to get a true picture of the overall findings without the original SCOT questionnaire which was sent out to services to establish context. No indication from stats how client tracking is done at service level. i.e. human resources & administrative aspect.
<i>3. Demand for, and perceptions of, information, advice and guidance.</i> (Guidance Council, 2005)	Taylor, J, Vasickova, D, Byrom, A, Dickson, J	<b>England only.</b> Primary research report of follow-up of 2000 research study. Clients who had accessed IAG.	Method: qualitative interviews with sample population that looked at 'demand for' and 'perceptions' of IAG. Assesses client satisfaction and uses/defines 'hard' and 'soft' outcomes.	Much larger scale & comprehensive research with some elements of report similar to REGSA in outcomes assessment & benefits of guidance. It is <u>not a tracking</u> of the participants of the 2000 study to see their long-term progression – more an updated study to examine perceptions of IAG users
<i>4. Intermediate Impacts of Advice and Guidance.</i> (DES, 2005)	Tyers, C. Sinclair, A. (IES)	<b>England.</b> Primary research report to assess the effectiveness of IAG services on outcomes for individuals. Clients	First wave research (intermediate impacts) using face-to-face and telephone interviews. Example of use of control group of non-users ('Information' only subjects). Respondents from <i>learnirect</i> , Jobcentre Plus and 24 IAG's (now <i>nextsteps</i> ). Further longitudinal needed to measure attitudinal differences between two groups.	Follow-up tracking dependent on value of findings to DfES, funding not definite at this point.

Quantitative & Qualitative				
5. <i>Opening a Door: Evaluating the Benefits of Guidance for the Adult Client: A Report.</i> (REGSA, July, 2005)	Hearne, L.	<b>Ireland.</b> Primary research report on evaluation study of one of the AEGI services. Clients of service.	Major learning in terms of design and implementation of quantitative method that can inform future practice and research studies nationally. Recommendations made for the service itself and further research in adult guidance nationally. Regular & long-term tracking required. More qualitative research needed to get better understanding of client's progression.	First report of its kind in relation to the Irish adult educational guidance service (AEGI). Selection sample only used two particular years so there were possible gaps in target groups. Quantitative returns in statistical format do visually capture outcomes but there is a need for qualitative data in the future.
The <i>State of Practice in Canada in Measuring Career Service Impact: A CRWG report.</i> (CRWG, 2005)	Magnusson, K. Lalande, V. (Alberta Uni's)	<b>Canada,</b> Review of career guidance provision & impact for future development of CDS. Involved 3 stakeholders – practitioners, service providers & policy makers/employers.	Methodology was both quant & qualitative. Recommends development of a research framework in evidence-based practice. Describes difficulties of quant & outcomes research, more longitudinal needed. Recommends improving outcome measurement, increased levels of sophistication and system support.	Key research document at national level as it addresses service impact and outcomes. Even though it was a wide-scale research activity it did not involve clients in the at all so their views have not been considered. It does recommend 'client input' (No.5) in the recommendations/next steps section.
7. <i>The Value of Guidance for Adults: A Research project by the Cambridgeshire and Peterborough IAG Partnership.</i> (MM Consultancy, 2003)	MM Consultancy	<b>England.</b> Primary research report of client tracking. Clients of IAG Partnership.	Questionnaires & case studies from telephone interviews of clients who had received guidance between 3-5 yrs. Problems of long-term tracking on pg. 8. Making personal contact beforehand ensured better response rate. High percentage in employment or education 5 years after guidance. Barriers similar to REGSA report. Disadvantaged find it harder to achieve positive outcomes.	An example of tracking study at service level which has similar findings to REGSA report; Recommends further research on barriers and information on labour market. Clients want to be followed up after guidance. Does not state whether recommendations were made for service improvement from the research.
Purely Qualitative				
8. <i>What is Effective Guidance? Evidence from Longitudinal Case Studies in England.</i> (IER, Warwick, & DES, 2004)	Bimrose, J, Barnes, S, Hughes, D, Orton, M.	<b>England</b> Primary research report - longitudinal case studies research of role of effective guidance. 49 clients	Highly valuable qualitative study that will make a major contribution to the field. In particular, it addresses the challenges of assessing and measuring effectiveness long-term through a particular interpretive methodology.	Study is evaluating effectiveness of guidance in terms of 'usefulness'; practitioner intervention, guidance activities and its effect on the client's long-term career decision-making. NB 'usefulness' concept long-term in its implications for practice and policy.

9. <i>Developing Career Trajectories in England: The Role of Effective Guidance.</i> (IER, Warwick, & DES,2006a)	Bimrose, J, Barnes, S, Hughes, D.	<b>England</b> Primary research report - longitudinal case studies research, follow-up to 2004. 36 clients from previous study.	Focus is on career trajectories of participants addressing barriers, influences, changing reflections on guidance interview as well as client views of career decisions. Four career decision-making styles found; evaluative, strategic, aspirational and opportunistic. Relevance of development of career management competencies.	Indicates that it takes a long time for clients to change/progress with internal and external factors playing major part in process. Clients' perceptions of 'usefulness' of guidance may or may not change over time and distance from initial guidance interview.
10. <i>Lifelong Vocational Guidance: European Case Studies.</i> (CEDEFOP & EFILWC, 1999)	Chiousse, S. Werquin, P.	<b>Europe</b> Report on practice involving 3 target groups	Detailed analysis of European vocational guidance interventions using case studies inc. Ireland. Good recommendations on evaluation of services.	Up to 1999, so pre the AEGI's. Focus on vocational guidance; youth and marginalised groups. Target groups range from employed to unemployed.
<b>Meta-analytic</b>				
11. <i>The Economic Benefits of Guidance.</i> (CeGS, 2002)	Hughes, D. Bosley, S. Bowes, L. Bysshe, S.	<b>United Kingdom</b> Meta-analytic review of current evidence on economic benefits funded by DfES.	Evidence in 3 main categories; opinion studies, outcome measurement studies, controlled studies. Recommends; co-ordinated strategies for measurement, extended studies, robust research and a national research database needed.	Supports need for research and longer term studies. Excellent of review of evidence to date. Meta-analysis shows main studies are in contexts of funded programmes, learning, employment-based, unemployed, graduates. Adults are part of these contexts.
12. <i>Economic Benefits of Career Development Services.</i> (CICA, 2006)	Access Economics Pty Ltd for CICA.	<b>Australia.</b> Scoping study on possible areas of research on Econ Benefits from CDS. Results to inform all st/holders – practitioners, clients & policy-makers.	Outlines potential avenues of research to help inform on benefits of CDS. Stocktake of current activity in Aus and abroad. Link between such research and Aust Gov Human Capital Agenda = improved workforce participation & mobility - Career guidance can prevent mismatch between workers' skills and economy's skill req. Education has direct effect on level of productivity in the economy.	Focus totally on economic benefits and all questions relate directly to 'hard' outcomes. Future research to measure outcomes should include; rates of labour force part., rates of unemployment, earnings, levels of study/FE, career satisfaction. Recommends longitudinal tracking that measure outcomes statistically. Does not mention qualitative research option.
13. <i>The Outcomes of Vocational Intervention (HB-VP, 1983)</i>	Spokane, A.R, Oliver, L. W.	<b>USA</b> Academic handbook on topic of outcomes.	Meta-analysis of outcome research of vocational intervention & recommendations related to methodology – sampling, control conditions, diagnosis of clients & outcome measures.	Does not give a detailed description of particular 'outcomes' but analyses and makes recommendations for future research. Use of scientific language and quantitative methods evident (meta-analysis).
14. <i>Outcome; What Contributes to Client Gain? (J-CP, 1988)</i>	Oliver, L. W. Spokane, A.R.	<b>USA</b> Updated analysis of 1983 study	Meta-analysis exploring relation of characteristics of career-counselling interventions to outcomes.	Refers to types of treatment and effect, length of treatment and magnitude. Meta-analytic methodology used here also.

<b>Best Practice</b>				
15. <i>Quality assurance mechanisms for Information, Advice and Guidance: A critical review.</i> (IER, Warwick, 2006b)	Bimrose, J, Hughes, D, Collin, A.	<b>United Kingdom</b> Review of QA methods and procedures for IAG. Desk research of evidence.	Looks at current mechanisms for QA and systems such as matrix and ALL, CPD, in a number of different contexts in IAG. Relevance to current Irish contexts in particular in relation to the 4 challenges named.	Discusses cost-effectiveness vs. quality issue and paucity of data on cost-benefit analysis. Identifies 4 key challenges of defining & measuring what is to be QA in guidance; terminology, user-friendly data management system, data on delivery strategies, insufficient training in data gathering and analysis techniques. However, does not mention contribution of clients to QA design.
16. <i>Study on 'Indicators and benchmarks for Lifelong Guidance', Draft Final Report.</i> (CEDEFOP, 2005)	den Boer, P, Mittendorff, K, Scheerens, J, Sjenitzer, T.	<b>Europe</b> Report for Expert Group on levels of PI & BM at national & European level to create strategy long-term strategy	Nb Covers all age guidance. Desk research and questionnaire used with examples of good practice. Main conclusions to be noted re. lack of comparability at national level & lack of data at European level preclude PI or BM in shortterm	Re Questionnaire note – table 8 policy outputs relate to employment and training outputs. Does include some elements of Personal Development in questionnaire. Note Irish context and lack of clarity on <i>referrals, progression and placement of clients.</i>
17. <i>IAG Review: Research and Analysis Phase.</i> (University of Derby, 2006)	Hawthorn, R. Ford, G.	<b>England.</b> Summary of Thematic Literature Review for ongoing IAG review. Research Partners for CeGS/NICEC	Changes in terminology required to meet needs of all stakeholders. A national policy based on CD competences required that would provide clarity to all (as in Canadian Blueprint).	This is a thematic literature review and not a research document. It may be seen as a reference point for current changes in England provide parallels with national policy developments in the future.
18. <i>Preliminary Study on Quality Guidelines and Criteria in Guidance: Final Report.</i> (CEDEFOP, 2004)	Henderson, L, Hignett, K, Sadler, J, Hawthorn, R, Plant, P.	<b>Europe</b> Review of QA in Europe for Expert Group carried out by Guidance Council and NICEC	Field work (questionnaire) and desk research. Aim - provide overview of existing quality guidelines and criteria. Capture good examples of policy and practice. Identify options for approaches that could be identified at European level	Key finding is that it supports the gap identified – lack of ‘user-led’ models. Does use marketing terminology, ‘consumer’ model when talking about users.
19. <i>Performance Indicators and Benchmarks in Career Guidance in the United Kingdom.</i> (CeGS Occasional Paper, 2006)	Hughes, D, Gratton, D.	<b>United Kingdom</b> Review of PI's and benchmarking as part of Cedefop European study. Key providers in 4 countries.	Very good overview of current practice in UK and issues involved in PI's and benchmarking, e.g. diffuseness of evidence financial investment and costs in IAG outcomes as opposed to service delivery. Recommends attitudinal and motivational outcomes, long-term so tracking is needed.	Supports the idea that practitioner's voice needed in development of indicators, analysis of data and design of evaluation frameworks that show multi-faceted approach of guidance. Does not mention the contribution clients can make in this area though.

<p>20. <i>Cross-government Review of Information, Advice &amp; Guidance (IAG) Services for Adults in England.</i> (iCEGS, 2008)</p>	<p>Hutchinson, J. Jackson, H.</p>	<p><b>England.</b> <i>Summary report of review of IAG</i></p>	<p>This review is part of the governmental overhaul of IAG to adults and informs the development of the AACS in the UK. Carried out a full review of provision to date and recommends an integrated model of future provision in the sector.</p>	<p>Supports the view (as in Ireland) that adults want guidance provision in line with their individual and holistic needs. This model favours an integrated service with other types of provision incl. housing, social welfare and job seeking supports. Different to AEGI in these respects.</p>
<p>21. <i>Supporting Employability: Guides to Good Practice in Employment Counselling and Guidance.</i> (EFILWC, 1998)</p>	<p>Watt, G.</p>	<p><b>Europe.</b> Guide to best practice. Eurocounsel st/holders involved in action research in 10 EU countries.</p>	<p>Monitoring and evaluation of outcomes from service provider &amp; client perspective should include quantitative &amp; qualitative measurements with clear objectives and process. Provides input (access), process, output (outcomes) model as a reference point for services to use.</p>	<p>A guide to good practice for guidance in employment only (not learning). Does not mention 'soft' outcomes in any great detail which would be important in such contexts. Uses old CLMS of FAS as a model of a system which has now been revamped.</p>

## Appendix C: Research protocol

### RESEARCH PROTOCOL

#### Proposed Research Method for Data Collection

January 2006

As the methodology is an interpretive investigation, it is proposed that the research questions will be addressed through the application of Grounded Theory in the form of a **Case Study**.

I will interview a group of adult clients as individual **Cases**.

The **Case Site** will be the Regional Educational Guidance Service for Adults in the Waterford Institute of Technology.

#### **Cases for Interview:**

Proposed number of clients = 4

Proposed length of time of interview = Approximately 1 hour per interviewee.

Proposed dates = early Spring 2006(April/May)

Proposed sample population = possibly purposively get 1 client from each of the target groups within the AEGI, i.e. VTOS, Literacy, Adult/Community Education and Others

Proposed group to contact = Identify clients who agreed to take part in further research on the original questionnaires, get their informed consent to be contacted again by for research purposes, and choose 4 clients initially to be interviewed.

#### **20/02/06: Meeting with REGSA Service Manager to negotiate access to clients**

I require written consent from the REGSA's Guidance Co-Ordinator to;

- (i) access the questionnaires from previous study in 2005 in order to select a sample group of clients to be contacted for the case studies,
  - (ii) external access to the service database to gain client information for point of entry and contact details, and
  - (iii) agreement that the interviews will be held at a suitable location outside of REGSA (if necessary) or outside of REGSA's opening hours, and in accordance with the clients' consent.
- Note that points (ii) and (iii) are to ensure that client confidentiality is maintained.

**Meeting Outcomes:** REGSA Service Manager requires the following conditions from me;

- (i) A guarantee that certain procedures are put in place in order to maintain ethical standards and ensure that client confidentiality and respect is upheld in the research process. This will be in accordance with the Institute of Guidance Counsellor's *Code of Ethics* for professional practice in guidance and research work and the submission made to the WIT's Ethics Committee on 21<sup>st</sup> February, 2006. A Case Study Plan will be implemented to follow due procedures. However, it is important to note at this point that such a plan is flexible and may change as the work develops, without compromising the service and the confidentiality of the clients involved. The agreed requirements involve:
- (ii) I have to submit a report to REGSA on the findings from the research.
- (iii) Once approval has been given by the Ethics Committee, I am to liaise directly with the REGSA Co-Ordinator. He will provide me with written consent to access clients.

(iv) The Service Manager has directed that the REGSA Co-Ordinator will make initial contact with the clients indicating that further research is being undertaken and ask if they wish to be contacted by the researcher for interviews.

#### **24/02/06: WIT's Ethics Committee Meeting Outcomes**

I have been granted ethical approval by the Ethics Committee to proceed with the research under the following conditions;

- (i) to furnish a copy of the consent form to the committee
- (ii) clients to be contacted directly by REGSA for their agreement to participate in the research and be contacted by me at a later stage in the selection process
- (iii) gain explicit written consent from the clients at the beginning of the process
- (iv) to use the guidelines regarding confidentiality from the IGC *Code of Ethics*.
- (v) to refer to an appropriate service if issues arise in the course of the interviews that cannot be appropriately dealt with in the research process.
- (vi) to furnish a brief, written report to REGSA regarding the research findings, analysis, recommendations and conclusions.

During the meeting on the 21<sup>st</sup> February the Committee also suggested that, as part of my analysis of the findings, I give a transcript of the interview to the client to ensure my interpretation is correct (*member checking*).

#### **24/03/06: Meeting with Service Co-Ordinator to negotiate access to clients**

The Service Co-Ordinator gave me a letter of consent to;

- (i) contact clients by letter, pending their agreement
- (ii) access the questionnaires from previous study
- (iii) access the database for client information.

As part of this agreement I am to follow IGC ethical procedures and furnish a written report at the end of the research.

**07/04/06:** Letter sent out by REGSA Co-Ordinator to all the client population (50) who agreed on the original questionnaire to be contacted for further research explaining the selection process. A copy of the published report (*Opening a Door*, 2005) was also sent to each client. They have the option of responding by April 21<sup>st</sup>, 2006 (cut-off date). Any replies will be included in the selection process. Four clients to be selected initially by me and I will contact them directly through a Consent Letter. This will be followed by direct telephone contact to schedule their interviews.

#### **Re: Selection of Suitable Clients for Case Interviews**

Initially it was the intention to choose 4 clients, 1 from each of the 4 target groups, but the Original Categories section on REGSA's database of the 50 clients indicate that they are predominantly from the Adult & Community Education target group. There is no-one from literacy and only 1 from VTOS. This will have to be reviewed when we hear back from the clients to determine our numbers for selection.

To support my research design, record my decision-making and data trail, I am following my own Case Study Plan as recommended by Robson (2002:184).

## SINGLE-CASE STUDY PLAN

*This is an abbreviated Single-Case Study Plan used for the primary data collection of the client case interviews conducted with the REGSA cohort which is adapted from Robson (2002:184).*

### **Data Collection Procedures**

#### ***Step 1: Access to Clients***

***(April 2006)***

As per written agreement from REGSA I have access to a target population of 50 clients from which 4 will be selected and contacted directly by consent letter from me describing in specific detail the following conditions for participation in the research:

- (i) purpose and brief description of the research and why the client is being asked to take part based on previous consent to be contacted,
- (ii) the client's contribution to the study; structure of the interview (length of time, date, recording instruments etc),
- (iii) confidentiality issues for the client including freedom to withdraw at any point in the research and destroying of their contribution,
- (iv) transcript of the interview will be given to client for verification (re; Ethics Committee)
- (iv) future publication details and the dissemination of the findings
- (v) the client's permission to be interviewed and the next step in the process of the scheduling of the interviews.

***n.b.*** A copy of the letter is to be sent to the Ethics Committee, for approval, before being sent out to clients. REGSA's Co-Ordinator to receive a copy also. (DONE)

#### ***Step 2: Selection of Clients from Initial Questionnaires***

***(07/04/06)***

The basis on which 50 REGSA clients, who ticked the relevant box on the questionnaire in the original study, are to be approached for further research: *'We may, at some time in the future, do follow-up case studies on the feedback received. If you would like to be included in further research, please tick box and supply details', (Opening a Door, 2005, Appendix 2, pg. 32).*

#### ***Step 3: Selection of Clients from Target Population of 50***

***(27/04/06)***

From population of 50 clients, 18 clients responded by the cut off date of 21<sup>st</sup> April, and agreed to be contacted directly by me. The breakdown is 12 clients from 2001 and 6 clients from 2003 (2:1). The profiles of the 4 clients selected from the target population with a consent letter forwarded to them are:

- Interviewee 1:** 2003 client is on a career break from full-time employment and waiting to start a Post-graduate course  
**Interviewee 2:** 2001 client has completed third-level education and is unemployed  
**Interviewee 3:** 2001 client in full-time third level education  
**Interviewee 4:** 2001 client is self-employed and undertaking continuous study

**Step 4:** Consent letter designed and posted out to four clients

(28/04/06)

**Step 5:** Interviews scheduled from week beginning 8<sup>th</sup> May.

**Step 6:** Location negotiated with REGSA for use of office for local interviews (evenings). One client will be interviewed in Enniscorthy Enterprise Centre, Co. Wexford as he is some distance from Waterford.

**Step 7:** Hire of dictaphone from Educational Services, WIT. (*done and returned in July*)

**Step 8: Data Collection**

Interviews to be completed, tape recorded, transcribed, note-taking and memo diary to be constantly updated.

**Step 9: Research Questions**

(08/05/06)

An interview format sheet has been designed to plan the interview and produce semi-structured questions for the first interview (Mason, 2002:71). The interviews are to be transcribed immediately and an initial review of the data will inform the revision of the subsequent case interview questions. Copies of the transcripts are to be sent to the clients to ensure correct interpretation and any changes will be recorded. (*completed end July*)

**Step 10:** Unsuccessful research candidates need to be written to at some point over next couple of months to update them on decisions and thank them for their agreement to be in the selection process. (*done 24/08/06*)

**Steps 5-9: Completion of Case Interviews**

(May 9<sup>th</sup> onwards)

**May 9<sup>th</sup>:** Interviewee 1 interviewed and transcribed. Transcript to be sent to client for cross-referencing. (*returned 23<sup>rd</sup> May, notes updated*)

**May 18<sup>th</sup>:** Interviewee 2 scheduled – client cancelled interview and rescheduled

**May 22<sup>nd</sup>:** Interviewee 2 scheduled – client rang again to change time and I decided not pursue this interview further as no definite time schedule could be agreed, now selecting a new client from 2001.

**May 23<sup>rd</sup>:** Sending out a letter to Interviewee 2 (new) today to be scheduled for interview. 2001 client in part-time third level education and community/voluntary work

**June 1<sup>st</sup>:** Interviewee 2 interviewed and transcribed. Transcript to be sent to client for cross-referencing. (*returned 19<sup>th</sup> June, notes updated*).

**June 7<sup>th</sup>:** Interviewee 3 interviewed and transcribed. Transcript to be sent to client for cross-referencing. (*returned 19<sup>th</sup> June, notes updated*).

**June 14<sup>th</sup>:** Interviewee 4 interviewed and transcribed. Transcript to be sent to client for cross-referencing (*returned 4<sup>th</sup> July, notes updated*)

**Introduction of another Case Interview:**

**June 19<sup>th</sup>:** On review of the data to date and identification of some gaps (re: employment), I have decided to do another interview. The client is on a

Further Education course in the VEC. Letter sent and interview has been scheduled for June 28<sup>th</sup>. Location is my own private consulting room as it is close to where she lives.

- June 28<sup>th</sup>:** Interviewee 5 cancelled her interview today as she is unavailable and unsure when she will be in the future. Due to time constraints I have to select another client and I have written to him today. He is a third level graduate whose quote was used as the title for the initial research report. At the time of the report launch last year (July) he had secured employment and I am interested to hear about his progression at this point.
- July 4<sup>th</sup>:** Interviewee 5 scheduled for interview in his workplace on 10<sup>th</sup> July.
- July 10<sup>th</sup>** Interviewee 5 interview completed in his workplace. Interview transcribed and copy sent to client on 14<sup>th</sup> July for cross-referencing (*returned 25<sup>th</sup> July, notes updated*). This is the last Case interview in the Case Study Plan. Data Analysis (Step 10) to be carried out in the Autumn.
- July 25<sup>th</sup>** Clients who were not called for interview need to be written to over the next few weeks to thank them for their interest.

***Step 10: Contact with non-selected clients***

***(24/08/06)***

Letters sent to clients who were not called for interview. If the need should arise, I left it open for them to be contacted in the future for further research.

***Step 11: Data Analysis***

Grounded theory coding procedures may be used with a computer software package such as QSR NVivo, available in WIT. This will be sourced in the Autumn.

***(Autumn, 2008)***

Focus of data analysis has changed since 2006. Discourse analysis will be conducted on client interviews of 2006.

***(January, 2009)***

***Step 12: Follow-up Telephone Interviews***

The five clients will be contacted by post in early February, 2009 to arrange for follow-up telephone interviews to establish their longitudinal progression since 2006. This data will bring the fieldwork to a close and be included in the Data Collection and Discussion Chapters.

***(March/April, 2009)***

***Step 13: Findings & Interpretation***

Write up of findings in a Case Study Report.

## Appendix D: Memo diary

Excerpts from PROJECT 'MEMO' DIARY
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*from 6<sup>th</sup> April, 2006 onwards*

**Memo; reflection** - Letters went out yesterday, 5<sup>th</sup> April and one former client contacted me directly to congratulate me on the report and I had to explain about the appropriate channels of communication, i.e. to respond back through REGSA. I found I tried to distance myself as the GC and take on the Researchers role. I imagine this is how it will be when interviewing former clients but I want to have the opportunity to research both my own and the GC's clients.

**Memo; method** - interested in interpreting the clients understanding of progression (the client's meaning). I feel a struggle with this as it is an 'intangible' concept, so I am not clear what my specific questions are – I need to be clear and specific or should I trust in the evolving information?

### 26th April

Out of 50 clients 18 agreed to be contacted for further research. I now have to come up with the criteria to select 4 clients. I feel nervous about actually interviewing clients as a 'researcher', as opposed to the role of GC which I am very comfortable with. I feel I will have to be more formal as an interviewer. I am now experiencing the process of re-engaging with former clients. I knew their story for a long time and I am now interested in finding out how they progressed. This is why I would like to interview at least 2 of my clients. Having done the work for the last number of years I feel that client's progression is determined by a number of factors both, intrinsic and extrinsic, to the client. However, this is my perception, based on my learning and experiences as a practitioner and career changer. The clients' stories and experiences may be very different. I have to be aware of any possibilities of researcher bias.

### 27th April

**Memo; method** - in selecting sample group from 18 clients, the database has missing information on the 18 clients:

2001 and 2003 clients – GC name is missing so I cannot recall whether some of the clients are mine or not

Robson advises to write down personal issues in undertaking the research. I have identified the main personal issue for me is that of the Guidance Counsellor/Researcher role and deciding who to interview and who not to interview.

What is my selection criteria? I am aware that each client has a very valuable story to tell and I would like to interview them all but it may not be feasible. As the topic is progression and longitudinal tracking and the proportions of agreed clients are 2:1, 2001:2003 I want to choose 3 from 2001 and 1 from 2003. I acknowledge that I am aware that some of the clients have experienced obstacles to their progress and I want to interview them to record their experiences. I would like to interview a mature student who is still in third level education as the Opening a Door report recorded that a sixth of the respondents were in full-time third level education.

My Selection Criteria: Sample clients who are *typical* of the client profile from these two years. Clients who indicate they have experienced some of the DES *criteria* outcomes (education, employment).

**4<sup>th</sup> May**

**Memo; reflection** - the idea of role reversal came to me when thinking of my Guidance Counsellor/Researcher positions. As a Guidance Counsellor I help people to find the answers but as a Researcher I have the expectation that the client will help me find the answers to my research problem.

**5<sup>th</sup> May**

**Memo; reflection** - I contacted two of my clients and they give the impression they are really interested in being interviewed – is this to please me. I think I have to be very clear and communicate it that it is for research and not a guidance session. One client stated she did not understand what the topic is about and thought she had to prepare answers in advance of the interview! I was getting the impression she felt she had to please me (as Rapley states ‘adequate interviewee’ 2004:16).

**9<sup>th</sup> May**

**Memo; method** - I have arranged for the first interview (**CASE 1**) to be conducted today. I realise that I have been very nervous all week about this interview. Up until this morning I still have not formulated a total list of definite questions and I realise that this is part of the process. I have designed an Interview format sheet (Mason, 2002:69) to break down different sections of the research topic to help me to produce possible research questions that are semi-structured. I know that it is not until I have completed the first interview and analysed it that I will have a better idea for the next interviews.

I am concerned about ‘how I will be’ as a researcher with the client, in particular as she is one of my former clients. I am concerned about getting the information I want – am I putting too much pressure on myself? I have arranged to use REGSA’s office as there is no-one there today. I have not held an interview in that office for a very long time. I have bought a Memo Notebook to record notes and my diary for the interviews.

**Post interview Memo; reflection** - the interview itself went well, everything worked as planned. I explained to the client the limitations of my confidentiality as directed by the IGC Code of Ethics before I turned on the tape recorder. I went through the conditions of the interview as laid out in the Consent Form before the client signed it. I asked the client to think about whether she wanted her name identified and I would discuss it with her at the end. I then turned on the tape recorder. I was aware that I was putting a lot of concentration into my listening, probing and clarifying skills. I am concerned that I may not have remained neutral. I found this particularly difficult because she had been one of my clients and I had been involved in her journey. At times I felt I had to hold myself back from being the Guidance Counsellor and giving direction. I am concerned that I may have used too much ‘emphasis’ when talking about the Dept of Educations performance indicators and that this could show a bias as the researcher. Did this influence the clients’ perceptions? I will have to see when I transcribe.

The client said she had been happy to contribute because of the help the service had given her. I also asked her whether she wanted her name identified in my write up and publication and she

said she would prefer to remain anonymous. I wrote this on the signed Consent Form, copied it, and gave her that copy also. The interview lasted approximately 1 hour.

**Oct 3<sup>rd</sup> 2006**

**Memo; method** – Focus Group Interviews; I facilitated two focused workshops at the NAEGA Conference in York. During the workshops the practitioners answered three key questions I put to them on the topic of progression. Similar themes emerged about progression not being measured adequately in UK guidance systems and concerns that the securing of funding for guidance was the main motivator for measuring ‘hard outcomes’. ‘Soft’ outcomes of a diverse range were offered by the practitioners. This now needs to be analysed and the workshop feedback can be used for triangulation in my thesis. There was also an interest in my methodology and use of case studies to highlight clients’ stories for CPD.

**Oct 10<sup>th</sup> 2006**

**Memo; reflection** – I have been reflecting on the interviews with the 5 clients and it has highlighted how much we miss out on the client’s progress by not keeping in regular touch with them. In particular this was emphasised with my own 3 clients and their experiences of trying to progress.

**Jan 15<sup>th</sup> 2007**

**Memo; method** – Last week I completed the data analysis and write up of the NAEGA workshops which will be used for triangulation purposes. It has given me a fresh perspective on the topic and is now focusing me on the next task which is the write up of the literature review chapter properly.

**Memo; data** – From the data analysis of the Focus Group interviews, one particular theme I had not considered emerged and that is the idea that progression can be seen as a **process** that engages both the Guidance Counsellor and the client. The person-centred approach was mentioned by a number of practitioners which the requirements of stakeholders/policy makers may neglect in their desire for achieved targets and hard outcomes.

**Feb 16<sup>th</sup> ‘07**

**Memo; method** – This week I completed the first draft of the Literature Review. It is divided into 4 sections. Having completed this after the field research and before the data analysis has added to my understanding of the topic. I need to stand back from it for a little while and go back to it again to write a proper Conclusion.

**Memo; reflection** – A number of things are coming to me from the literature review now. I need to get a deeper understanding of the theoretical perspectives in guidance, the ideologies informing it (see Watts). The indicators are at three levels, the clients (still to be seen in the data analysis), the practitioners (triangulation section) and dept of education (needs an interview or some other form of analysis).

As a practitioner working with clients I did not have a name on what the process was – i.e. mobility. This raises some questions for me; are we just there to help make people mobile, to move them forward economically? Is this what the ultimate outcome is all about? Is there not a conflict/tension in our work because of this?

**Feb 26<sup>th</sup>, 07**

**Memo; method** – Reading the literature review for editing I think I would like to interview the 5 clients again after I have done their data analysis. As with the Bimrose study it would be important to track them 12-18 months later to add rigour to my data analysis. The literature review is stressing gaps in certain areas, in particular in the context of adult guidance provision.

**Sept 18<sup>th</sup>, 07**

**Memo: reflection** – I attended the IAEVG conference in Italy at the beginning of month where I presented a paper on the research. It was a great experience that allowed me to see the extent of the research in the field of guidance. I learned that a new European Lifelong Guidance Policy Network will be established later in the year in Finland.

***Notes to self re thesis***

Supervisor mentioned I need to look at culture and the structures that provide subjectivities/subject positions/identities that people take up. In particular in relation to generalisability of my study. (notes from email in my diary).

My transfer viva threw up some things I need to consider. Important are the **constraints** on my research.

(1) The aim of the research: I set out initially in my aims to inform the design of a QA system to measure client progression in longitudinal tracking. However there is a system (database) in place already but the findings can inform and make recommendations for future developments and procedures of the current system.

(2) The duality of my position, keeping my foot in both camps (applied researcher – practitioner/researcher): what I am allowed access to through my role as a practitioner/researcher in the field, i.e. the database, questionnaires and anecdotal information given to me by guidance colleagues, reports and publications in the public domain, literature that is unavailable to me that I read about (e.g. evaluator's report mentioned in the SPSS report that was only made available to the Dept, NCGE and Advisory Committee). My research necessitates me to network with leading experts in the field to find out what is happening regarding quality assurance. A case in point of this has been the work directly forwarded to me by Sultana from the Copenhagen meeting (2006) to make recommendations for the drafting of the European QA reference points. I was aware of this meeting but having direct firsthand knowledge of the current position of research completed (Henderson) and the continuing developmental work is keeping me up to date on progress at a European level.

*Re The focus of the study:* - the policy, - the practice, and the missing bit – the voice of the user in the QA process. I am going into a policy/practice problem (the interface between the two) because adult guidance practice is still emerging in Ireland.

**Oct. 10<sup>th</sup>, 07**

**Memo: reflection** In relation to my analysis for the context of my research I feel I need to read up more on the policy that is driving the Lifelong Guidance Agenda and need evidence of the effectiveness of guidance interventions.

**Nov. 21<sup>st</sup>, 07**

**Memo: reflection** I've been given the go-ahead by Postgraduate Committee to transfer to Phd Register, pending some minor amendments to be completed by 4<sup>th</sup> December. This will now call for an expansion of my study. The new Integrated Framework document which was launched by the NGF last month will underpin future policy in Ireland and be a reference point for my study.

Currently doing a scope of the policy documents related to LLG and LLL agenda which is proving to be quite detailed. Maeve suggests looking at social policy re the harmonisation (convergence) of policy and practice.

**Dec. 12<sup>th</sup>, 07**

**Memo: reflection** Got approval from Registrar's office after amendments made. Mentor supervisor to new supervisor has been identified in the college. Next step in the process is to go to the Academic Council before forwarding to HETAC. This will happen in January.

**Memo: method** - This week I am addressing secondary data collection and creating a grid of the policy documents related to the topic, internationally, European and national – from the top-down approach to the localised setting of REGSA. I can already see a shift in my thinking and understanding. My literature review will need some major re-drafting, in particular with a focus on the policy section. I am also scoping the developments in guidance since the 1990's to contextualise my topic.

**Jan. 31<sup>st</sup> 2008**

**Memo: method.** Have now transferred officially in WIT and working with new supervisor. I am now looking at new literature, discourse analysis, my data analysis of transcripts and the approaches I need to take. Sitting in on NVivo training to see if I will use it for my transcript analysis. I am considering both 'Within-case analysis' and a 'Cross-case pattern searching'. I need to go back to Yin and Stake regarding this. It could open up the data by looking at each individual client as a case in itself (providing a vignette) as well as doing a comparison between the different cases to see similarities and differences within each person's story. This could flesh out the data and findings more. Have discussed with my supervisor the possibility of going back into the field and doing a quantitative survey with the cohort of 18 clients based on the findings of my qualitative data, for both validity in terms of getting more information and because it is a longitudinal tracking study over a period of years. Another option is a follow-up interview with the five clients since I last contacted them in 2006.

**Feb. 22<sup>nd</sup>, 08.**

**Memo: method.** Currently getting trained on using Nvivo and have decided I would like to use the system to analyse transcripts. Will help with the process of distancing myself from the client interviews. Reading up now on Critical Analysis and CDA to analyse my data from a critical standpoint. Interested particularly in Foucault and his notions of knowledge, power and control to argue my points on the controlling nature of tracking and objectifying client progression. Where people are defined as the object of knowledge, of scientific discourse (becomes normalised into practitioner discourse – outcomes classified scientifically)

**March 7<sup>th</sup>, 08.**

**Memo: data.** Reviewing the transcripts again I see how there are some similar ideas among the four adults who had returned to education – they talk about the barrier to progression because of not having a Leaving Certificate. They also use it as a **gauge of their ability** by comparing themselves to younger students (2,3,4,5). In relation to returning to education the issue of age has cropped up for the three older clients, comparing themselves to younger students and the idea of being too old to be a student, especially clients 2 & 5. Financial strains evident with three of the clients (1,3,5) whereas it is not a barrier with the other two (2,4). I note the clients use of *emotional subjective language in their discussion about their progression.*

Two clients state that they weren't *ready for education* at the point of contact. C1 wasn't ready for education, but ready for change. Uncontrolled circumstances (structural) prevented her from pursuing her education options immediately after guidance. For C4 controlled circumstances prevented him from pursuing education immediately, it took two years for him to plan and organise his life and work to be ready to start.

Adult learners not only talk about their own experiences of education showing their **tenacity and resilience** to stick with it by giving examples of other student's experiences (those who drop out) (3,5)

**Personal barriers** evident – managing time and juggling other responsibilities that get in the way of studying (2,4,5)

**Career Decision-Making** – three male clients in particular talk about the long-term view of their future career, display evidence of strategic decision-making in their career planning. See education as a path to a new career direction which will provide longerterm security, (3,4,5). The two female clients talk about returning to education for more personal reasons. Client 1 because her job is making her unhappy and is feeling unfulfilled. Client 2 returned to pursue a lifetime dream with no clear career goals at the end of it.

**March 11<sup>th</sup>, 08.**

**Memo: method** The process of revisiting all the transcripts in preparation for NVivo analysis highlighted: the time distance between the research interviews and preliminary categorisation in 2006 and the preparation of analysis in March 08' allowed for more objectivity and seeing the data through fresh eyes. Additional themes were picked up in the clients' stories.

**April 29<sup>th</sup>, 08.**

**Memo: method** – Observation 2: From April 14<sup>th</sup> to 18<sup>th</sup> I visited Finland to observe the system of guidance in another EU country. I got the opportunity to observe a client data management system in the employment office there. It was very similar to the FAS system in Ireland, with its links with the unemployment office to monitor clients progress. Some of the functions of both systems are similar to the AEGI also.

**Aug 21<sup>st</sup>, 08.**

**Memo: method** I have decided to change the focus of my thesis and use Critical Discourse Analysis to critically analyse and interpret the discourses of the clients, practitioners and policy makers. I am abandoning the use of NVivo for data analysis. I have been reading a lot on the issue of *criticality* in research and feel it is a gap that I can address on the whole discourse on outcomes. My supervisor agrees with this focus. It is complicated but I have decided not to go down the road of Critical Theory, but instead opt for a 'limited' criticality in my argument. In particular, I want to address the 'critical' turn that my research took and the importance of the discourses in relation to the meaning making process.

**Sept 29<sup>th</sup>, 08**

**Memo: Reflection** I attended the NAEGA conference last week and presented a workshop on Practitioner-Research. The group exercise provided valuable feedback on some areas I had not considered as I have been removed from client contact for a while now. It would appear that due to funding constraints and policy changes fewer numbers are attending the conference. The new Adult Advancement and Careers Service (in the UK only) is now underway and being rolled out on a pilot basis (as with the AEGI some years ago). The changes are causing tensions as there is

a lot of insecurity with the new tendering process. This has also affected EGSA in NI who will now have to apply to tender to offer services. In order to address this they completed an 'economic benefits' study and are using economic discourse for policy-makers.

**Autumn, 2008**

As the focus of the data analysis has changed since 2006, discourse analysis will be conducted on the client interviews of 2006. It is will also be used on the practitioner focus groups and secondary documents, through content analysis. The five clients will need to be contacted again early in 2009 to establish their progression journey and current situation. The possible method would be a short telephone interview.

**Jan 8th, 2009**

The five clients will be contacted by post in early February, 2009 to arrange for follow-up telephone interviews to establish their longitudinal progression since 2006. This data will bring the fieldwork to a close and be included in the Data Collection and Discussion Chapters.

**Feb 9<sup>th</sup>, 2009**

Letters will be sent this week to the five clients about a follow-up telephone interview to track their progression to date. A proforma questionnaire has been designed based on the four key areas that are under examination in the transcripts. Four out of five interviews were held at the end of the month. Owen (Client 4) did not respond to my letter and I decided not to pursue it any further because of time constraints and his possible unwillingness to participate. All the field work has been completed now drawing that phase of the research to a close.

## Appendix E: Interview consent letter

*Date*

**Re: Research Interview for Case Study**

Dear ....

Thank you for agreeing to participate in a Case Study Interview as part of my MA studies.

The title of my research project is:

**“Can progression be effectively measured within longitudinal tracking systems in adult guidance provision?”**

It will be a 1 hour tape-recorded interview, in a convenient location, to be arranged with you in due course.

At the start of the interview I will need your written consent that you understand the conditions involved in the research (see below). These are designed to protect your privacy and respect your contribution.

- (i) your participation is entirely voluntary
- (ii) you are free to withdraw at any time in the process and any contribution made will be subsequently destroyed
- (iii) the interview will be kept strictly confidential and will be available only to myself, and my supervisor. Excerpts from the interview may be made part of the final research report, but under no circumstances will your name or any identifying characteristics be included in this report.

I hereby understand the above conditions and agree to participate in the research.

Signature:..... Date:.....

Please contact me if you have any queries. I will be in touch with you shortly by telephone to finalise the arrangements for the interview.

Yours sincerely,

Lucy Hearne, Researcher.

## Appendix F: Client interview schedule

### *Interview Schedule of Selected Clients (2006)*

	<b>My client</b>	<b>Not my client</b>	<b>2003</b>	<b>2001</b>	<b>male</b>	<b>female</b>	<b>comments</b>
Client 1	X		X			X	Interview held on 09/05/06 Transcript returned on 23/05/06.
<i>Client 2 (a)</i>		X		X		X	<i>Interview was not carried out, as client was not available.</i>
Client 2 (b)		X		X		X	Interview held on 01/06/06. Transcript returned on 19/06/06.
Client 3	X			X	X		Interview held on 07/06/06. Trancript returned on 19/06/06.
Client 4		X		X	X		Interview held on 14/06/06. Transcript returned on 4/07/06.
<i>Client 5 (a)</i>	X			X		X	<i>Interview was not carried out on 28/06/06 as client was not available</i>
Client 5 (b)	X			X	X		Interview held on 10/07/06. Transcript returned on 25/07/06.

\* all interviews now completed with transcripts returned by clients (25/07/06)

## Appendix G: Semi-structured interview questions

### Semi-Structured Individual Interview Questions

#### May 9<sup>th</sup> (1<sup>st</sup> interview)

- According to your questionnaire, when you first met with REGSA in 2003 you indicated you need help with a Career Change, is this correct?
- Can you describe what has happened since then?
- How do you feel about your progress to date?
- Have there been specific obstacles and/or achievements in your progress?
- Has receiving guidance helped you?
- Would you like your progress to be tracked regularly and long-term?
- What would you like to be asked in a tracking survey?
- Do you feel you, as a user of the service, have something to contribute to the design of tracking surveys?
- The Dept. of Education currently wants statistical feedback about client progression, i.e. numbers in education and employment – what do you think about this?
- Is there information you would like the Dept. to know about your progression?

#### June 1<sup>st</sup> (2<sup>nd</sup> interview)

- According to your questionnaire, when you first met with REGSA in 2001 you indicated you were seeking help with a Mature Student 3<sup>rd</sup> level application?
- Can you describe what has happened since then?
- How do you feel about your progress to date?  
*- re; achievements and difficulties experienced*
- Has receiving guidance helped you?
- One of the aims of the research is to find out if and how users of the service can contribute to the design of tracking systems to assess client progression. Would you like your progress to be tracked regularly and long-term?

- The Dept. of Education currently wants statistical feedback about client progression, i.e. numbers in education and employment. Services have to give feedback on clients 'ready for education', 'ready for employment'. At the time of your guidance do you feel you were 'ready' for.... at that point?
- Do you think they might need to get other information from clients about their experiences and progress? What would you like to be asked in a tracking survey?
- Is there information you would like the Dept. to know about your progression?
- Evaluation of guidance provision is now becoming a priority in Ireland and in Europe. Policy makers and providers now talk about the clients as 'customers' and 'consumers'. What do you think about been called .....

<b>June 7th (3<sup>rd</sup> interview)</b>
--

- According to your questionnaire, when you first met with REGSA in 2001 you indicated you were seeking help in a number of areas; returning to education as an adult, applying as a mature student and a career change?
- Can you describe what has happened since then?
- How do you feel about your progress to date?
  - *re; achievements and difficulties experienced*
- If you could use one word to describe your progress to date, what would it be?
- Has receiving guidance helped you? Have your expectations been met?
- In relation to receiving guidance, would you like your progress to be tracked regularly and long-term by the guidance services?
  - *what would you like to be asked in a tracking survey about your progression?*
- Do you think clients can help services by providing feedback on their experiences?
- The Dept. of Education currently wants statistical feedback about client progression, i.e. numbers in education and employment. Services have to give feedback on clients 'ready for education', 'ready for employment'. At the time of your guidance do you feel you were 'ready' for.... at that point?
- Do you think they might need to get other information from clients about their experiences and progress?
  - *is there anything you would like the Dept. to know about your progression?*
- Evaluation of guidance provision is now becoming a priority in Ireland and in Europe. Policy makers and providers now talk about the clients as 'customers' and 'consumers'. What do you think about been called .....

#### June 14th (4th interview)

- According to your questionnaire, when you first met with REGSA in 2001 you indicated you were seeking help in a number of areas; returning to education as an adult, education/training course options and applying as a mature student.
- Can you describe what has happened since then?
- Did you have a set goal in mind when you first received guidance?
- How do you feel about your progress to date? What does it mean to you?
  - *What do you feel you have achieved?*
  - *Have you experienced any difficulties?*
- If you could use one word or phrase to describe your progress to date, what would it be?
- Has receiving guidance helped you? Have your expectations been met?
- Purpose of research ‘progression and tracking’ - would you like your progress to be tracked regularly and long-term by the guidance services?
  - *what would you like to be asked in a tracking survey about your progression?*
  - *how often would you like to be tracked?*
- Do you think clients can help services by providing feedback on their experiences?
- The Dept. of Education currently wants statistical feedback about client progression, i.e. numbers in education and employment. Services have to give feedback on clients ‘ready for education’, ‘ready for employment’. At the time of your guidance do you feel you were ‘ready for’....?
- Do you think they might need to get other information from clients about their experiences and progress?
  - *is there anything you would like the Dept. to know about your progression?*
- Evaluation of guidance provision is now becoming a priority in Ireland and in Europe. Policy makers and providers now talk about the clients as ‘customers’ and ‘consumers’.
  - *What do you think of these terms?*
  - *What would you prefer to be called – customer, consumer, client?*

#### July 10th (5th interview)

- According to your questionnaire, when you first met with REGSA in 2001 you indicated you were seeking help in a number of areas; *returning to education as an adult, mature student application, education/training options, improving promotion prospects, career change.*
- Can you describe what has happened since then?

- Did you have a set goal in mind when you first received guidance?
- How do you feel about your progress to date? What does it mean to you?
  - *What do you feel you have achieved?*
  - *Have you experienced any difficulties?*
  - *What had your previous education level been at that point?*
- If you could use one word or phrase to describe your progress to date, what would it be?
- Has receiving guidance helped you? Have your expectations been met?
- What was your reaction when you received the questionnaire last year?
  - *would you like your progress to be tracked regularly and long-term by the guidance services?*
  - *what would you like to be asked in a tracking survey about your progression?*
  - *how often would you like to be tracked?*
- Do you think clients can help services by providing feedback on their experiences?
- The Dept. of Education currently wants statistical feedback about client progression, i.e. numbers in education and employment.
  - *At the time of your guidance do you feel you were 'ready for education', 'ready for employment'?*
  - *When did you feel 'ready for employment'?*
  - *Did the work experience on the programme help you with regard to employment?*
  - *What skills do you feel you have gained from your education?*
- Do you think they might need to get other information from clients about their experiences and progress?
  - *is there anything you would like the Dept. to know about your progression?*
- In evaluation policy makers and providers now talk about the clients as 'customers' and 'consumers'.
  - *What do you think of these terms?*
  - *What would you prefer to be called – customer, consumer, client?*

## Appendix H: UK Glossary

**Abbreviated glossary of some of the key information, advice and guidance providers in the UK (Source: Hughes, 2007:11; Hughes & Gration, 2006:13)**

*Careers Scotland* provides free careers information, advice and guidance to the people of Scotland regardless of age, background or circumstances.

*Careers Wales* is the national brand for the all age careers information, advice and guidance services funded by the National Assembly for Wales.

*Connexions* is the government's support service for all young people aged 13 to 19 in England only.

*EGSA (Educational Guidance Service for Adults)* is based in Northern Ireland and is a major provider of guidance which has the status of a 'company limited by guarantee'.

*Jobcentre Plus* was established across the whole of the United Kingdom in 2002 to support people of working age into employment.

*learnirect* was established in 1998 as an information, advice and guidance service on opportunities for learning and employment. It operates an integrated model with local and national providers across England, Scotland, Wales and Northern Ireland.

*nextstep (England)* is the brand name for local face-to-face information and advice (IA) services funded by the National Learning and Skills Council (NLSC). There is a *nextstep* service in each of the 47 local LSC areas in England operated by a network of subcontractors (592). These networks include: further education colleges, voluntary and community organisations, trade unions, and some employers.

## Appendix I: Focus group questionnaire

### *NAEGA Workshop on Measuring Client Progression: Questionnaire*

The current research study is an examination of the concept of 'progression' in adult guidance contexts from the perspective of a number of stakeholders in education – theorists, funders, policy makers and the clients themselves. As guidance practitioners, the researcher would value your perspective on the topic by answering the following questions. Your contribution is confidential, voluntary and very much appreciated. Thank You, Lucy Hearne.

**Q.1** *What is your definition of progression for clients?*

**Q.2** *Is it the same as 'stakeholders' in your organisation (i.e. your employers, funders, policy-makers)?*

Yes  No

*Please explain further:*

**Q.3** *To what extent do you think clients' progression is being measured adequately in adult guidance?*

**Your Professional  
Title/Role:**.....

## Appendix J: Observations visits report

### Fieldwork Report: Findings from Observations of Two Client Data Management Systems in Ireland and Finland

#### Introduction

This report provides a documentary analysis of the findings from observational fieldwork carried out in Ireland and Finland during 2006 and 2008. In Model 1 emphasis is placed on the design and operation of the client data management system itself; whereas in Model 2 the focus is on the national quality assurance systems used to evaluate outcomes.

#### **Model 1 (Ireland): FÁS Caseload Management System**

##### *Overview of FÁS Employment Service*

In the FÁS Employment Service there are processes in place to progress clients from initial access to the service onto employment. The Caseload Management System (CMS) is the client database used to record data on clients engaging with FÁS. There are two categories of clients: (i) drop-in clients and (ii) referred National Employment Action Plan (NEAP) clients. Drop-in clients are those who present voluntarily to FÁS for assistance. NEAP clients are referred by the Department of Social and Family Affairs (DSFA) when they sign on for jobseekers allowance or benefit. As the CMS is used for benefit monitoring, the DSFA and FÁS share personal data on clients. The progress of NEAP clients who have been referred to FÁS for intervention/guidance is tracked through weekly updates between the DSFA and FÁS. Some of the figures used by the DSFA in its reports to government are generated from the CMS.

In order to access any type of support clients need to officially register with FÁS Employment Services. This is the gateway to all FÁS services. Clients then receive a guidance interview with an Employment Services Officer (ESO) which will determine the next step in the process, that is, case loaded on the CMS for further guidance intervention. All NEAP clients are automatically case loaded. Clients who need long-term support are internally referred to the Local Employment Service (LES) as part of the dual-strand of FÁS services. A high support process is available to clients who are '*not progression ready*' due to health-related issues, for example, a specific disability.

##### *Observation of the FÁS Caseload Management System (CMS)*

The theoretical framework of the CMS system is based on the Ali and Graham four-part model of career guidance (1996:46). The specific progression phases built into the system are: (i) *clarifying*, (ii) *exploring*, (iii) *evaluating*, and (iv) *action planning*. Each phase of the model has a set of progression steps that the client needs to complete in order to move onto the next progression phase on the system. For example,

phase (iv) *action planning* involves the three steps of ‘action planning’, ‘implementation’ and ‘evaluation’, representing a beginning, middle and end to the process in this phase. A client action plan is developed and each meeting or interaction with the client is recorded. Clients are given a print-out of their action plan at the end of each guidance session.

The client’s career path profile incorporates ‘*Client Steps*’, in the form of text and related information charting the client’s progression such as referrals to FÁS training/other training courses, community programmes and employment. ‘*Barriers*’ are recorded to assess what may be preventing clients from progressing into education/training or employment. Ten barriers are categorised that include *poverty trap, numeracy, literacy, transportation*.

Whilst the CMS has a number of similarities with the AEGI adult guidance management system (AGMS), it also offers a more structured and sophisticated model for client record keeping. Nonetheless, three specific design limitations were observed:

- i. The system’s theoretical model would appear to provide a structured and transparent system for recording guidance activities with clients through ‘client actions plans’. However, when dealing with the complexities of clients’ lives, it is not always a simple process of moving a client from one phase to the next in a structured way. This may put pressure on the ESO and client to produce ‘progression steps’ to achieve prescriptive outputs.
- ii. The long-term monitoring of client progression does not appear to be a priority. The system is not designed or used for longitudinal tracking and is limited to the point of the client ‘entering employment’. This appears to be the final outcome required by the DETE. Currently clients are only tracked for up to two months after the guidance process is completed, at which point they may (or may not) be in employment. If the client’s case is still live this indicates he/she may need help in the future, for instance, completion of training programme to progress onto employment.
- iii. The heavy monitoring of client activities by a number of different stakeholders raises issues of confidentiality and privacy for clients. A large volume of staff and outside agencies have access to client records as the CMS is an element of the wider Client Services System within FÁS. Staff who have access to the CMS data include: Registration Officer, Employment Services Officer (ESO), Caseload Officer, and Local Employment Service Mediator.

## **Model 2 (Finland): Public Employment Service Data Management System (URA)**

### ***Overview of the Finnish Employment Service***

The Lahti employment office is situated in the Päijät-Häme region of Finland. The public employment service (PES) employs 135 staff across the region. On average, there are 1,970 job vacancies per month. Nationally, there are 260 vocational guidance psychologists providing free guidance support to young people and adults in the Finnish employment service. There are 11 vocational psychologists in the Päijät-Häme region. The main services offered by the employment office are: vocational guidance and career planning, career and training information, labour market training and various other support services that promote employment.

Quality assurance is a systematic feature of the Finnish PES. This includes regular evaluation on the vocational counselling services. The head vocational psychologist in the Lahti employment offices is involved in follow-up studies for the Päijät-Häme region. A 2005-2006 study examined the impact of career counselling services in the region's PES one year after the clients had finished receiving guidance. The client information used for tracking was gathered from the URA database. The findings show that:

- 1) 50% of the clients had followed their individualized guidance action plans;
- 2) 60.6% were actively in vocational training, education, work or subsidized work;
- 3) 28.8% were in work try-outs, placement or preparatory training;
- 4) 4.4% had made no progress.

Nationally, the Ministry of Employment and the Economy (MEE) conducts evaluation of vocational counselling annually (quantitative) and bi-annually (qualitative) as part of the PES's quality assurance process. A variety of data collection methods are used including statistical surveys (information on clients, guidance activities), quality assessments (customer feedback surveys on provision), occasional impact studies and new project development. In the customer feedback survey qualitative data collection involves approximately 3,000 telephone interviews on clients' experiences of vocational guidance.

At the time of my visit in April, 2008 a national follow-up study of 2007-2008 was being implemented. The methodology was both quantitative and qualitative. The study was focusing on cost-effectiveness of employment/education oriented counselling and the function of the vocational guidance service to support the strategic goals of the employment offices. The long-term goal of the Ministry is to develop a model for the future follow-up of vocational counseling services.

### ***Observations of the Finnish Client Data Management System (URA)***

My observation of the PES client data management system (URA) in the Lahti office was facilitated by a vocational psychologist and a translator. The observation involved a general overview of the URA system's content and function. The URA's centralized database allows for the recording of client information, long-term client tracking and statistical reporting. Quantitative information on client numbers, guidance activities and progression outcomes can be generated from the URA both locally and nationally.

Even though both the vocational psychologist and the Employment Officer (EO) have access to client data, confidential information disclosed to the psychologist can be shielded from the EO and other URA users. Certain confidential information (health diagnosis) can only be stored on the system with the client's consent. Therefore, the EO may be aware that there is a 'health issue' but may not be informed of the exact details.

Client information stored on the URA system includes: personal details; labour history; education; mapping of client action plan (including the obstacles encountered); unemployment payments; allocation to work; education or training; and progression outcomes. The URA system records the client's progression steps over the period of intervention and the final outcome when he/she is finished with the vocational psychologist. It also creates a client profile that can be matched with the employment vacancy database for a suitable job match.

In terms of storage time on the system, client records are kept live for the duration of the guidance/employment support intervention and archived when not in use. They can be reactivated if a client re-engages with the employment office at some point in the future. However, it was not made clear to me whether the outcomes obtained from customer feedback studies were fed back into individual client records to profile their progression.

### **Discussion of Findings from Two Observation Visits**

The purpose of the observation visits was to learn about alternative quality assurance processes and client data management systems used by other adult guidance providers. A comparative analysis of both systems and the current AEGI client data management system (AGMS) highlights similarities and differences between all three systems for future design considerations. *See Chapter 7, 7.1.4.*

With regard to similarities all three service providers (AEGI, FÁS, and the Finnish PES) have a similar guidance role. The role is to support clients in their education and career progression and achieve national public policy goals determined by their individual government departments. The different departments in

Ireland (DES and DETE) and Finland (MEE) operate a 'top-down approach' through the regular monitoring of immediate outcomes and service activities.

The primary function of all three service providers' client data management systems (AGMS, CMS and URA) is to record client information and to track client progression, albeit to certain degrees. Currently, the longitudinal tracking of progression does not appear to be a major priority across the three providers. Longitudinal tracking is not conducted in the AEGI, FÁS track to the point of 'entering employment', and the Finnish PES track clients for short-term evaluation only. Currently, in terms of categories for outcome measurement, the final outcomes in the AEGI are either *education* and/or *employment*. In FÁS and the Finnish PES the final outcomes measured are *employment*.

With regard to using the client data management system for quality assurance purposes, the Finnish PES appears to be more focused and efficient in its regular evaluation of the vocational counselling service. It also recognizes the importance of a mixed method approach (quantitative and qualitative) in its evaluation procedures. It is understood anecdotally, following the 2005 formative evaluation (SPSS, 2005), the NCGE is currently undertaking a summative evaluation of the AEGI. This may possibly involve both types of methods.

In terms of differences between the individual client data management systems I observed one significant divergence related to the quality of design. Compared to the AGMS, the CMS and the URA are more sophisticated in that they use structured client action plans with printouts given to the clients at the end of each session. The two advantages of formalised client action plans are that there is a record of the guidance session on the data management system, and a printed action plan places responsibility on the client to follow-up what has been decided upon in the guidance session. The AGMS does not have such a facility. Instead, notes on client activities are recorded on the system by the practitioner during or after the guidance session. These are not physically given to the client. Therefore, the method for recording decisions or actions to be addressed is entirely at the discretion of the guidance practitioner.

Finally, another significant difference between all three client data management systems relates to the issue of confidentiality and the sharing of client information. In both FÁS and the Finnish PES, access to and sharing of client information is more indiscriminate due to benefit monitoring. In this instance, the AEGI projects have better data protection standards as only the local adult guidance service has access to its own client records. Individual client information is not shared with other services or with the DES. This ensures a considerable level of confidentiality between the guidance practitioner and the client in the AEGI services.

**May, 2008**

## Appendix K: Client follow-up letter

9<sup>th</sup> February, 2009.

Dear

I hope this follow-up letter finds you well. You very kindly participated as a case study interviewee in my postgraduate research study in 2006. At the time your contribution provided a very valuable insight into the issue under investigation.

The investigation expanded over the subsequent three years and is now coming to a close. As it would prove very beneficial to hear about your progression since we last met, I am contacting you to check if you would be willing to participate in a brief telephone interview. This follow-up interview would be at your convenience. If you wish to be contacted, please complete the details below and return this letter to me in the stamp-addressed envelope attached.

As with your previous research interview, the same conditions apply:

- (iv) *your participation is entirely voluntary*
- (v) *you are free to withdraw at any time in the process and any contribution made will be subsequently destroyed*
- (vi) *the interview will be kept strictly confidential and will be available only to myself, and my supervisor. Excerpts from the interview may be made part of the final research report, but under no circumstances will your name or any identifying characteristics be included in this report.*

**I hereby understand the above conditions and agree to participate in a telephone interview.**

**Signature:..... Date:.....**

**Telephone No.....**

**Suitable time/s to be contacted for interview.....**

If you have any queries, please do not hesitate to contact me at 086/8599337.

Yours sincerely,

Lucy Hearne,  
Postgraduate Researcher, WIT.

## Appendix L: Follow-up interview proforma questionnaire

### Follow-Up Client Interviews (Spring 2009) Telephone Interview Proforma

#### **1. Introduction:**

Thank client for participating, explain there will be short number of questions and reiterate confidentiality conditions.

#### **2. Client's Current Situation:**

Establish their current situation – education, employment, voluntary work etc.

#### **3. Progression Journey:**

Check on their progress since research interview in 2006

- changes in circumstances
- obstacles
- career management/decision-making
- attitudes
- motivation

#### **4. Outcomes:**

Review with client his/her goals and achievements to date

- hard outcomes (education, employment)
- soft outcomes (personal)
- readiness for next stage

#### **5. Guidance Intervention:**

- has it been beneficial?
- has the client engaged with guidance since 2006
- will the client need guidance in the future

#### **6. Longitudinal Tracking:**

Review with the client what he/she said about being involved in longitudinal tracking in 2006

- does the client feel the same way now
- are there any other experiences that need to be measured

#### **7. Future Plans:**

Find out what the clients' plans are for the next year, and further down the line if possible

## Appendix M: Extracts from client transcripts in data analysis

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### Extract 1: Joan

L; Okay, so what have you learned about that whole process then, about yourself?

N; Am, what I have been told by people, like to trust in that things will work out and I suppose, that things do work out and not that you have to kinda expect them to work out but, you know I did send CV's and I did ask around, and I did enquire, you know, so..

**Excerpt 9: in dealing with stress client has learned to develop a sense of optimism that things will be okay**

L; And do you think that the education institution, you know, the college, do they have any idea of the impact that their decisions have on students? Their waiting to start..

N; Well they say they have been as frustrated as us, but, am, I suppose they haven't had the course running either, so there have been no Art Therapists going in to come out, you know what I mean, so I understand their frustration but at times I was just pulling my hair, going 'do you realize what you are saying', you know, they were very vague in their letters, there weren't, it was just the fact that nothing was definite with them, like, but they were patient with us, so.

**Excerpt 10: uses the metaphor of pulling her hair out to express the frustration at lack of progress**

**Excerpt 10a: her lack of progression has been because of the structural barriers put in her way**

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### Extract 2: Katherine

L; What you are saying is, ah, education, the providers, the provision is not flexible in fulltime for adults, is that what you are saying?

C; I feel it's not, not for people who have been out of fulltime education. Certainly those who had just completed their Leaving Certificate, it was easy for them to make that step from second level to third level because they were used to being in school all day, ..and would be able to actually time themselves a little bit better I think as far as study was concerned and, am, a lot of them would have done a lot of the subjects for their Leaving Cert..

**Excerpt 19: she believes that younger students find it easier to deal with the transfer into third-level study (*assumption here*)**

L; Okay.

C; ..whereas at the time that I started that fulltime course, I would have been out of secondary, well High School in the States, I would have been out for well over thirty five years I think, so..

**Excerpt 20: she is reiterating here that her age was an obstacle to learning**

L; Right..  
C; ..you know, I just, and having only done part-time courses in between..  
L; Right..  
C; ..I did, all of a sudden I had seven or eight subjects and it was like ‘Oh my God’ (laughs)  
how ....

**Excerpt 21: she felt overwhelmed by the commitment involved**

---

**Extract 3: James**

L; Okay, so how do you feel about your progress to date then in relation to your education, in relation to maybe achievements and difficulties that you have experienced as well?  
F; Well, I think it's, I am doing well given the fact that I am not supposed to be able to retain information for a start.

**Excerpt 17: happy with this progress so far despite his disability**

L; Okay.  
F; Now I know that we all have our moments and that we forget things and sometimes I do, it just requires more concentration. ..the way that I get around it is, I am after getting very good at developing, ‘work arounds’ is what I call them, and what I think is great is ahm, what do you call them, mind maps..

**Excerpt 18: encountering learning obstacles encouraged him to develop new learning skills**

L; Okay, yeah.  
F; ..and, because, if I have learned nothing else I've become very adept at realizing that a picture is worth a thousand words, that you can see more in a drawing than you can out of this is what you do...step one, step two, step three, step four kinda thing...that you can see more, you can visualize it more, that the area of visualization is far better, with me anyway than words.  
L; So you have learned, ahm, certain ahm, learned..  
F; ..skills, yeah..  
L; Okay, and were they all self-taught, or did you have to..., did you have to discover that yourself?  
F; I did yeah, yeah.  
L; Right.  
F; Well, I had seen an article on mind maps in the newspaper one day and I said to myself, Jesus this could be a handy kind of a thing like you know, so I enquired a little bit more, went rooting on the web a little bit more about it...and, ah, tailored them to my own needs.

**Excerpt 19: he used his creative skills to meet his own learning needs**

#### **Extract 4: Owen**

L; So ahm, now the guidance services have to establish whether the clients are ready for education or ready for employment. So, at the time you received guidance do you feel that you were ready for education?

E; At that time?

L; Yes, you know, did you take up some form of education?

E; Mmm, I'd say, at that time, well I probably wasn't ready at that time. I would say a year or two after that...I knew I wasn't going to be ready for a year or two because of the way I was at home...the commitments I had at that time, work commitments. Does that answer your question?

**Excerpt 33: he felt he wasn't ready for education when he got guidance; he had to put plans in place**

E; ...well when I started education, you know, it was going to be a change for me.

**Excerpt 34: he knew lifestyle change would be an outcome for him**

L; And did that decision have any impact on the other people then involved in the farm and the house?

E; It would yeah. I'd say the parents wouldn't have been that terribly happy. They would have rather seen me farm...full-time...had to bring them around to that way of thinking. Although they would have seen that there wasn't much of a future in it either. They wouldn't have liked though me going back to education, but they couldn't have argued with it either.

**Excerpt 35: the changes had an impact on those closest to him**

**Excerpt 35a: saying his parents opinions were an obstacle that he had to overcome**

L; Right, okay, so ahm, then at that point when you were looking at your options and you were thinking well I need maybe to do something different here, because this is not going to work forever, do you feel you would have been ready to go out into the world of work?

E; At that stage?

L; Yes.

E; No.

**Excerpt 36: he felt he was not ready for employment either at that stage**

L; Right.

E; No. Well, I'd say, it took me two years to get ready for education and two more years to get ready for working..

**Excerpt 37: readiness for him has happened in stages**

## Extract 5: Derek

L; Okay, so the last...we are winding down now, you'll be glad to know! The last question, okay, in evaluation policy makers.... and you would know about policy, and providers now talk about clients as customers and consumers. So with regards to clients who come to the guidance service, what do think of these terms...you know, that a person that comes to get guidance is a customer or consumer, or client?

M; I would personally have the word client...now that's only a personal thing. We've...I've had an awful lot of meetings in the last week at different committees that I'm involved with and people are now talking about...I've got a guy who is going to be housed within the next week and we had a multi-disciplinary meeting on Friday morning for...to do a care plan for him, right, and one of the people who were at it...the whole meeting went on a person about one word they said 'it's not a care plan, it should be a support plan'. Now I'm not a social support worker and the one word that always stood out to me in what I did was the one word care.... and we actually...it went on for about two hours about the word support and care, whereas the real thing was the client...

**Excerpt 48: he would prefer to be called a client**

**Excerpt 48a: he is using an analogy from his work environment to show how the person (client) can get lost in the language used by the experts**

L; Okay.

M; ....and I don't know, I would....I think to myself to go into some place and be regarded as a client, be called a client, it's more important. I mean to me a customer is a person who goes in and buys a pair of shoes, or goes in and gets a pound of butter...or whatever the case may be....and what was the other one you used?

L; Ahm, consumer.

M; Consumer again, I mean....it would go hand in hand with customer. Now I am only saying client, if there is a better word out there at the moment I really don't know what it is, but I think its client and my clients have no problem, I mean....

**Excerpt 49: he uses the metaphor of a financial transaction for customer/consumer**

L; Okay.

M; ...ah, I think client...at the moment, as I say, when somebody comes up...but I would prefer it to customer and consumer. You're a customer when you walk into any shop....

L; Right.

M; ....but I think when you go to, go to....back to education or something you just don't want to be another customer, I think it's nice to make a little difference....I think it's....regardless of client to anybody prior to it, you know, it's just ah, I think it's a great term.

**Excerpt 50: saying here that economic language is incompatible with ethos of education**

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## Appendix N: Client transcripts data sets

### Case 1: Data Sets

Areas for analysis in the discourse segments:	Conceptual categories	pattern codes
<b>1. Progression Experience</b>		
Exc 1: vagueness of time span as progress is halted	[progression process =	<i>delayed</i> ]
Exc 12: has had to continual reflect and evaluate her career decisions	[progression process =	<i>evaluative</i> ]
Exc 2a: lack of progression is emotionally stressful	[negative aspect =	<i>emotional stress</i> ]
Exc 7: <u>metaphor</u> of limbo-land to describe lack of progress	[negative aspect =	<i>limbo-land</i> ]
Exc 8: upheaval caused a constant state of anxiety	[negative aspect =	<i>emotional stress</i> ]
Exc 3: review of events and new work experiences brings self-awareness	[positive aspect =	<i>leaving comfort zone</i> ]
Exc 4: time has given greater clarity on what she wants	[positive aspect =	<i>clarity of vision</i> ]
Exc 5: excited by the possibility of new experiences	[positive aspect =	<i>hopeful of future</i> ]
Exc 9: overcoming stress gives a sense of optimism things will be okay	[positive aspect =	<i>optimism</i> ]
Exc 26: feeling of moving forward now	[positive aspect =	<i>now a movement forward</i> ]
Exc 17: temporal <u>metaphor</u> used to describe her personal journey	[attitude to progression =	<i>personal journey</i> ]
Exc 10: <u>metaphor</u> of pulling her hair out to express the frustration at lack of progress	[attitude to progression =	<i>frustration</i> ]
Exc 37: despite all setbacks her experience has been positive ( <i>contradictions</i> )	[attitude to progression =	<i>overall optimistic</i> ]
Exc 42: progression conditioned by the time it takes to change	[intrinsic factor =	<i>time it takes to change</i> ]
Exc 42a: and the factors that she has no control over, i.e. course start	[extrinsic factor =	<i>events outside of her control</i> ]
<b>2. Obstacles Encountered</b>		
Exc 10a: lack of progress because of the structural barriers	[structural obstacle =	<i>course suspended</i> ]
Exc 11: uncertainty of course start was a progression obstacle	[structural obstacle =	<i>uncertainty</i> ]
Exc 43: thoughts of her stage in life, time passing , and being held up by the suspension of course	[structural obstacle =	<i>age</i> ]
Exc 20: client uses a temporal <u>metaphor</u> to describe the lengthy waiting to start process	[structural obstacle =	<i>time lost</i> ]
Exc 15: other peoples judgements and opinions have effected her own progress in past	[personal obstacle =	<i>other people</i> ]
Exc 15a: sense of loss of self-identity in the process	[personal obstacle =	<i>identity lost</i> ]
Exc 19: financial issue is major factor for client	[personal obstacle =	<i>financial</i> ]
Exc 24: <u>metaphor</u> of tunnel vision used to block other career options and choices	[personal obstacle =	<i>tunnel vision</i> ]
Exc 25: client describes the rigidity of her work situation as a block to looking at other options	[personal obstacle =	<i>tunnel vision</i> ]
Exc 44: factors that client has had to consider were age, finances, and travel	[personal obstacle =	<i>age, finance, travel</i> ]
Exc 2: as client had taken career break she had to find another means of income	[strategy response =	<i>subbing work</i> ]

### 3. Outcomes of Guidance

Exc 1: her career aim is to move into new discipline	[career outcome =	<i>new career]</i>
Exc 6: still hesitant that this is the career that she wants	[career outcome =	<i>sense of uncertainty]</i>
Exc 12a: uses <u>adjectives</u> to show obstacles made her flexible and able to face challenges	[soft outcome =	<i>flexibility]</i>
Exc 21: upset and frustration has evaporated over time	[soft outcome =	<i>acceptance of situation]</i>
Exc 16: self-confidence has increased over three years	[soft outcome =	<i>confidence over time]</i>
Exc 22: learning that she can deal with most things now	[soft outcome =	<i>better coping skills]</i>
Exc 23: realisation some things are beyond her control	[soft outcome =	<i>self-realisation]</i>
Exc 23a: wait for a resolution and learn to adapt to situations	[soft outcome =	<i>adaptability]</i>
Exc 25a: uses <u>metaphor</u> to show her change in mindset	[soft outcome =	<i>'think outside the box']</i>
Exc 36: opportunities highlighted insularity of her previous work situation, and allowed her to break out of those strictures	[soft outcome =	<i>more open-minded]</i>
Exc 18: she knows what she is going to do now – get a qualification (contradiction to ex. 6)	[hard outcome =	<i>aiming for a qualification]</i>
Exc 13: psychologically she was not ready for education at first intervention stage	[client readiness =	<i>psychologically not ready]</i>
Exc 14: Client uses the <u>metaphor</u> of location – a better place - to express readiness for study	[client readiness =	<i>in a better place now]</i>
Exc 40: client uses <u>metaphor</u> of movement to describe how she was ready for change (a shift)	[client readiness =	<i>psychological shift]</i>
Exc 40a: took three years to be ready for study	[client readiness =	<i>takes time]</i>
Exc 41: use of <u>pronoun</u> - determining readiness is responsibility of the individual client	[client readiness =	<i>client's decision]</i>

### 4. Client's Contribution to Design of Longitudinal Tracking Survey

Exc 39: does not mind statistical measurement as the issue is a quality assurance one	[methodology =	<i>quantitative acceptable]</i>
Exc 28: open to being tracked long-term	[amenable to tracking =	<i>yes]</i>
Exc 28a: regular tracking: possibly twice a year, using short questionnaires	[regularity =	<i>possibly twice a year]</i>
Exc 27: client uses an adjective (delighted) to describe how she felt when she was tracked	[response to contact =	<i>delighted]</i>
Exc 27a: two reasons for tracking, (i) service took an interest in her progress	[purpose =	<i>legitimacy of experience]</i>
Exc 27b:and, (ii) if things weren't going well it was a reminder that there is help available	[purpose =	<i>reminder of help available]</i>
Exc 29: importance of tracking to demonstrate the vagaries of clients' progression experiences	[purpose =	<i>capriciousness of progress]</i>
Exc 30: client expressing that her experiences are legitimate	[purpose =	<i>legitimacy of experiences]</i>
Exc 31: knowledge of starting point (from first guidance) and ending	[purpose =	<i>track the journey]</i>
Exc 32: many new opportunities opened up from guidance intervention that need to be captured	[purpose =	<i>spectrum of opportunities]</i>
Exc 33: survey needs to measure satisfaction with choices and decisions, possibility of change again, learning gained from education, were expectations met, what is the reality now.	[o/c measurement =	<i>hard and soft outcomes]</i>
Exc 34: guidance provides clarity between the perception of an ideal career and the reality	[o/c measurement =	<i>ideal career vs. reality]</i>
Exc 35: even though client feels cheated because her expectations still have not been met, she has gained personally from the experience (balancing of what happened to her)	[o/c measurement =	<i>personal outcomes]</i>
Exc 38: her commitments are manageable, others might find it more difficult to make changes	[o/c measurement =	<i>change is subjective]</i>
Exc 45: <u>analogy</u> of ethos of education incompatible with the learner as a customer or consumer	[language =	<i>incompatible with guidance]</i>

Exc 46: prefers to be called a client as it is used in many helping and therapeutic disciplines	[language =	<i>client appropriate</i> ]
Exc 47: <u>metaphor</u> of consumerism to describe coldness of a transaction	[language =	<i>financial transaction</i> ]
Exc 47a: does not sit easily with the idea of ‘personal’ development	[language =	<i>incompatible with pers dev</i> ]

## Case 2: Data Sets

Areas for analysis in the discourse segments:	Conceptual categories	pattern codes
<b><i>1. Progression Experience</i></b>		
Exc 1: seized opportunity to return to education when the time was right	[progression process =	<i>opportunistic style</i> ]
Exc 2: early on she had a subject learning block that prevented progress	[progression process =	<i>halted</i> ]
Exc 8: client has had previous learning experiences	[progression process =	<i>retrospective</i> ]
Exc 9: client stating that her learning progression has not been linear to date	[progression process =	<i>non-linear experience</i> ]
Exc 10: her learning journey started before guidance intervention	[progression process =	<i>retrospective</i> ]
Exc 6a: she is now ready to take up learning journey again	[attitude to progression =	<i>motivation to start again</i> ]
Exc 15: client disappointed at not achieving a qualification	[attitude to progression =	<i>disappointment</i> ]
Exc 15: client disappointed at not achieving a qualification	[attitude to progression =	<i>qualification means progress</i> ]
Exc 4: client had to reconsider her education options for progression	[intrinsic factor =	<i>ability to reevaluate</i> ]
Exc 6: client decided to take time out for personal commitments	[extrinsic factor =	<i>family commitments</i> ]
Exc4a: option to go part-time was beneficial to her progression	[positive aspect =	<i>availability of alternatives</i> ]
Exc 17: client feels the progression leap into fulltime education was difficult	[negative aspect =	<i>leap to third level too big</i> ]
Exc 21: client felt overwhelmed by the commitment involved	[negative aspect =	<i>emotional stress</i> ]
<b><i>2. Obstacles Encountered</i></b>		
Exc 11: client’s progression hampered because of timetabling	[structural obstacle =	<i>timetabling</i> ]
Exc 11a: travel also an obstacle	[structural obstacle =	<i>distance of college</i> ]
Exc 18: client found third-level system is inflexible and not adult friendly	[structural obstacle =	<i>inflexibility of institutions</i> ]
Exc 3: learning block was major obstacle for progression	[personal obstacle =	<i>subject learning block</i> ]
Exc 16: stating that age was an obstacle to progression (extrinsic context)	[personal obstacle =	<i>her age</i> ]
Exc5: client experienced another obstacle, family commitments (extrinsic context)	[personal obstacle =	<i>family commitments</i> ]
Exc 19: assumption younger students find it easier to overcome obstacles (extrinsic context)	[personal obstacle =	<i>assumptions about others</i> ]
Exc 20: reiterating that her age was an obstacle	[personal obstacle =	<i>her age</i> ]
Exc 22: learning block was a consistent obstacle	[personal obstacle =	<i>subject learning block</i> ]
Exc 43: she had to deal with friends’ lack of understanding (extrinsic context)	[personal obstacle =	<i>lack of support from friends</i> ]
Exc 44: client could not change friends’ negative perception of education	[personal obstacle =	<i>negative attitudes of friends</i> ]

Exc 23a: reiteration of her age compared to other students	[personal obstacle =	<i>her age</i>
Exc 12: client had no option because of family commitments	[strategy response =	<i>get guidance on local options]</i>
Exc 5: client negotiated taking singular subjects and a less intensive pace	[strategy response =	<i>cut back to part-time]</i>

### 3. Outcomes of Guidance

Exc 7: hasn't yet achieved a full qualification	[hard outcome =	<i>lack of qualification]</i>
Exc 23: expressing her sense of achievement that she crossed the threshold	[soft outcome =	<i>return to learning]</i>
Exc 24: education helped her to make new friendships	[soft outcome =	<i>new friendships]</i>
Exc 25: she got personal satisfaction from her learning experiences	[soft outcome =	<i>personal satisfaction]</i>
Exc 26: believes every type of educational experience has a positive learning outcome	[soft outcome =	<i>open-mindedness]</i>
Exc 27: reiterating the outcome was to achieve a lifetime ambition	[ultimate outcome =	<i>to realize a dream]</i>
Exc 30: education was to be a personal outcome over a career outcome	[ultimate outcome =	<i>personal more important]</i>
Exc 28: reiterating no specific goal in mind, it was to challenge herself	[goal =	<i>process over final outcome]</i>
Exc 29: stating her final outcome was not a career because of her age	[ultimate outcome =	<i>not career focused]</i>
Exc 31: here the client is reiterating it was for her own personal achievement	[soft outcome =	<i>for education's sake]</i>
Exc 37: client assertively stating that she was ready for education	[client readiness =	<i>space for education]</i>

### 4. Client's Contribution to Design of Longitudinal Tracking Survey

Exc 32: tracking is a valuable process	[amenable to tracking =	<i>yes]</i>
Exc 33: helpful to find out clients experiences, and be a reminder that supports are available	[purpose =	<i>gather information]</i>
Exc 34: tracking helpful for providing case studies to support users in their choices	[purpose =	<i>reminder of support]</i>
Exc 35: she believes it would be valuable for finding out where people end up	[purpose =	<i>case studies]</i>
Exc 35a: and did they follow through on their decisions	[purpose =	<i>end result for clients]</i>
Exc 36: and to find out clients expectations and their reality	[purpose =	<i>decision follow through]</i>
Exc 38: tracking in terms of finding out how many get qualified and where they are career-wise	[o/c measurement =	<i>expectations vs. realities]</i>
Exc 39: implying that only those who get qualifications should be tracked	[o/c measurement =	<i>qualification = employment]</i>
Exc 40: finding out who got employment based on their education is important	[o/c measurement =	<i>qualifications more import.]</i>
Exc 41: client stating that personal development outcome (i.e. satisfaction) needs to be measured also to capture peoples experiences	[o/c measurement =	<i>numbers in employment]</i>
Exc 42: tracking questions need to examine clients' decisions and personal learning experiences	[o/c measurement =	<i>personal satisfaction]</i>
Exc 42a: feedback would also help to see how the structures can be improved for learners	[o/c measurement =	<i>decisions &amp; experiences]</i>
Exc 45: client prefers to be called client	[o/c measurement =	<i>structures improvement]</i>
Exc 45a: uses the <u>analogy</u> of going shopping to describe consumer/customer	[language =	<i>client preferable]</i>
	[language =	<i>financial transaction]</i>

Exc 46: reiteration of <u>analogy</u> of shopping transaction	[language =	<i>financial transaction</i> ]
Exc 47: wants to be treated as an individual not one of a mass	[language =	<i>individual experience</i> ]
Exc 48: stating that personal relationship between counselor and client is special	[language =	<i>personal 1-to-1 basis</i> ]

### Case 3: Data Sets

Areas for analysis in the discourse segments:	Conceptual categories	pattern codes
<b>1. Progression Experience</b>		
Exc 14: had already started his IT education prior to guidance	[progression process =	<i>retrospective</i> ]
Exc 6a: back on track again after period of time	[progression process =	<i>cyclical</i> ]
Exc 25: progression becoming more challenging with increase in level of the course	[progression process =	<i>linear</i> ]
Exc 17: happy with his progression so far	[attitude to progression =	<i>contentment</i> ]
Exc 23: feels his progress has been excellent from where he started initially	[attitude to progression =	<i>excellent</i> ]
Exc 27: his progression performance has exceeded his initial expectations	[attitude to progression =	<i>exceeded expectations</i> ]
Exc 6: progression halted for time out because of family	[extrinsic factor =	<i>family priorities</i> ]
Exc 20: he was forced to constantly adapt through in leaning progression	[intrinsic factor =	<i>adaptability</i> ]
Exc 7: <u>metaphor</u> of limbo-land to describe his employment progression	[negative aspect =	<i>limbo-land</i> ]
Exc 3: he managed to overcome the obstacle of solo learning for two years	[positive aspect =	<i>stick-ability</i> ]
<b>2. Obstacles Encountered</b>		
Exc 2: he was the only learner on the course for the two years	[structural obstacle =	<i>being a solo learner</i> ]
Exc 21a: age gap since previous learning was a concern for him	[personal obstacle =	<i>age gap in learning</i> ]
Exc 5: unforeseen family commitments create an obstacle for him (extrinsic context)	[personal obstacle =	<i>family demands</i> ]
Exc 21: encountering new subjects was an obstacle for him	[personal obstacle =	<i>new subjects</i> ]
Exc 15: unable to juggle the demands of fulltime work and part-time education in prior learning	[personal obstacle =	<i>juggling</i> ]
Exc 18: encountering learning obstacles led to developing new learning skills	[strategy response =	<i>self-directed learning</i> ]
Exc 19: used his creative skills to meet his own learning needs	[strategy response =	<i>creativity</i> ]
<b>3. Outcomes of Guidance</b>		
Exc 4: has achieved a Higher Cert after two years progress	[hard outcome =	<i>a higher qualification</i> ]
Exc 12: outcome from guidance was a total career change	[hard outcome =	<i>total career change</i> ]
Exc 9a: the ultimate outcome is to be self-employed	[ultimate outcome =	<i>self-employment</i> ]
Exc 9: stating that his goal is to get a qualification and a new idea	[goal =	<i>career mobility</i> ]

Exc 10: still appears to be hesitant about his long-term career goal  
 Exc 22: self-discovery of his ability to understand quickly  
 Exc 26: to deal with challenges he can think outside the box  
 Exc 28: prior expectations had been restricted because of his educational gap  
 Exc 24: he feels he returned to education at the right time in his life  
 Exc 34: was ready for education in 2001, for financial reasons  
 Exc 35: believes determining readiness is the responsibility of the individual

[goal = *sense of uncertainty*]  
 [soft outcome = *able to learn quickly*]  
 [soft outcome = *'think outside the box'*]  
 [soft outcome = *expectations now been met*]  
 [client readiness = *right time*]  
 [client readiness = *financially ready*]  
 [client readiness = *readiness individual decision*]

**4. Client's Contribution to Design of Longitudinal Tracking Survey**

Exc 29: amenable to regular long-term tracking  
 Exc 29a: purpose of tracking should be to get accurate information  
 Exc 30: purpose is to get intervention (help) if needed  
 Exc 31: necessary to keep in touch with clients of the service  
 Exc 32: an intervention mechanism to support those in the guidance system  
 Exc 33: feels tracking is a reciprocal process between the service and users  
 Exc 36: it is important for him that he is asked what his goals are  
 Exc 37: analogy of hiring people to show life experience needs to be captured in tracking  
 Exc 38: questionnaires can be biased with predetermined categories or inference  
 Exc 39: implying that quantitative analysis is rigid and inflexible  
 Exc 40: client stating that meaning is different for people  
 Exc 41: he would prefer to be called a consumer than a customer  
 Exc 42: defines consumer in general user terms, customer as an economic transaction  
 Exc 43: implying that a free service should not call users customers

[amenable to tracking = *yes*]  
 [purpose = *accurate information*]  
 [purpose = *reminder of help available*]  
 [purpose = *keep in touch*]  
 [purpose = *mechanism of intervention*]  
 [purpose = *reciprocal process*]  
 [o/c measurement = *goals and achievements*]  
 [o/c measurement = *life experiences*]  
 [methodology = *bias in quantitative tracking*]  
 [methodology = *inflexibility of quant tracking*]  
 [methodology = *variances of meaning*]  
 [language = *prefers consumer*]  
 [language = *financial transaction*]  
 [language = *incompatible with free service*]

## Case 4: Data Sets

Areas for analysis in the discourse segments:	Conceptual categories	pattern codes
<b>1. Progression Experience</b>		
Exc 1/21: progression story has been straightforward up to this point	[progression process =	<i>linear</i> ]
Exc 6: he had been cautious and deliberate in his decision-making	[progression process =	<i>circumspect style</i> ]
Exc 10: particularly proud of his progression to date	[attitude to progression =	<i>pride</i> ]
Exc 11: measuring his progression to where he started from initially (secondary sch)	[attitude to progression =	<i>giant leap</i> ]
Exc 12: reiterating he is pleased with the way things have worked out for him so far	[attitude to progression =	<i>pleased</i> ]
Exc 19: his progress has been surprising to him	[attitude to progression =	<i>surprise</i> ]
Exc 20: reiterating measuring progression from where he started to where he is now	[attitude to progression =	<i>great strides</i> ]
Exc 49: reiterating here quality of life as he progresses is not great at moment	[negative aspect =	<i>poor quality of life</i> ]
Exc 3: did not have any difficulties in his education progression	[positive aspect =	<i>smooth transition</i> ]
Exc 34a: a purposeful approach in preparing for the change	[intrinsic factor =	<i>judicious</i> ]
Exc 35: the changes had an impact on those closest to him	[extrinsic factor =	<i>bringing others on board</i> ]
<b>2. Obstacles Encountered</b>		
Exc 2: indication that there was an educational gap coming back into education	[personal obstacle =	<i>education gap</i> ]
Exc 4: concern that incomplete early education would be an obstacle returning	[personal obstacle =	<i>low self-belief</i> ]
Exc 15: disconnecting himself from the farm was an obstacle	[personal obstacle =	<i>disconnection process</i> ]
Exc 35: his parents' opinions were an obstacle he had to deal with (extrinsic context)	[personal obstacle =	<i>parents attitudes</i> ]
Exc 18: had to make new work arrangements in order to return to education	[strategy response =	<i>change work practice</i> ]
<b>3. Outcomes of Guidance</b>		
Exc 9: he was clear on his career outcome	[ultimate outcome =	<i>new career</i> ]
Exc 13: believes that he has achieved a secure future for himself	[ultimate outcome =	<i>secure future</i> ]
Exc 22: ideal outcome would be to do part-time work in both sectors	[ultimate outcome =	<i>foot in both camps</i> ]
Exc 16: he achieved a qualification after two years	[hard outcome =	<i>qualification</i> ]
Exc 17: returning to learning was a new challenge for him	[soft outcome =	<i>new challenge</i> ]
Exc 23: found that his work practice changed when working for someone else	[soft outcome =	<i>adaptability</i> ]
Exc 24: changes have brought positive outcomes with new relationships	[soft outcome =	<i>new friendships</i> ]
Exc 25: receiving guidance gave him the confidence to progress	[soft outcome =	<i>self-confidence</i> ]
Exc 51: reiterating that the outcomes have exceeded initial expectations	[soft outcome =	<i>expectations exceeded</i> ]
Exc 34: he knew lifestyle change would be an outcome for him	[soft outcome =	<i>lifestyle change</i> ]

Exc 42: appears to be definite about his career choice at moment  
 Exc 48: stating that his eventual goal (work balance) may not be achievable  
 Exc 50: comparison between younger people's decisions and readiness of adults  
 Exc 33: wasn't **ready for education** initially; he had to put plans in place  
 Exc 36: he felt he was not **ready for employment** either at that stage  
 Exc 37: readiness for him has happened in stages

[ultimate outcome = *clarity of vision*]  
 [goal = *work balance uncertain*]  
 [client readiness = *determined by age*]  
 [client readiness = *not ready for education*]  
 [client readiness = *not ready for employment*]  
 [client readiness = *progressive readiness*]

**4. Client's Contribution to Design of Longitudinal Tracking Survey**

Exc 26: uses a rhetorical question to challenge the likelihood of tracking  
 Exc 27: says he is amenable to being tracked  
 Exc 28: stating that tracking every 3-4 years would be ideal  
 Exc 39: tracking is useful to find out uptake of options  
 Exc 40: would be important to find out the reasons for lack of uptake also  
 Exc 41: people who don't progress are just as important  
 Exc 32: a reciprocal process of information gathering to see how clients are doing  
 Exc 29: would like questions on where he is now in his life  
 Exc 30: would like to be asked about his future goals  
 Exc 31: would want to be asked about his satisfaction with outcomes  
 Exc 38: questions should look at why people aren't ready (i.e.what's not being asked)  
 Exc 43: implying that the terms mean it will eventually incur a fee for users  
 Exc 44: wording implies a financial transaction is happening  
 Exc 45: has preference for the term client  
 Exc 47: reference to the personal relationship that is involved

[methodology = *likelihood of tracking*]  
 [amenable to tracking = *yes*]  
 [regularity = *every 3-4 years*]  
 [purpose = *uptake after intervention*]  
 [purpose = *lack of progression*]  
 [purpose = *legitimacy of experiences*]  
 [purpose = *reciprocal process*]  
 [o/c measurement = *current situation*]  
 [o/c measurement = *future goals*]  
 [o/c measurement = *personal satisfaction*]  
 [o/c measurement = *why not ready*]  
 [language = *financial transaction*]  
 [language = *financial transaction*]  
 [language = *client appropriate*]  
 [language = *personal process*]

## Case 5: Data Sets

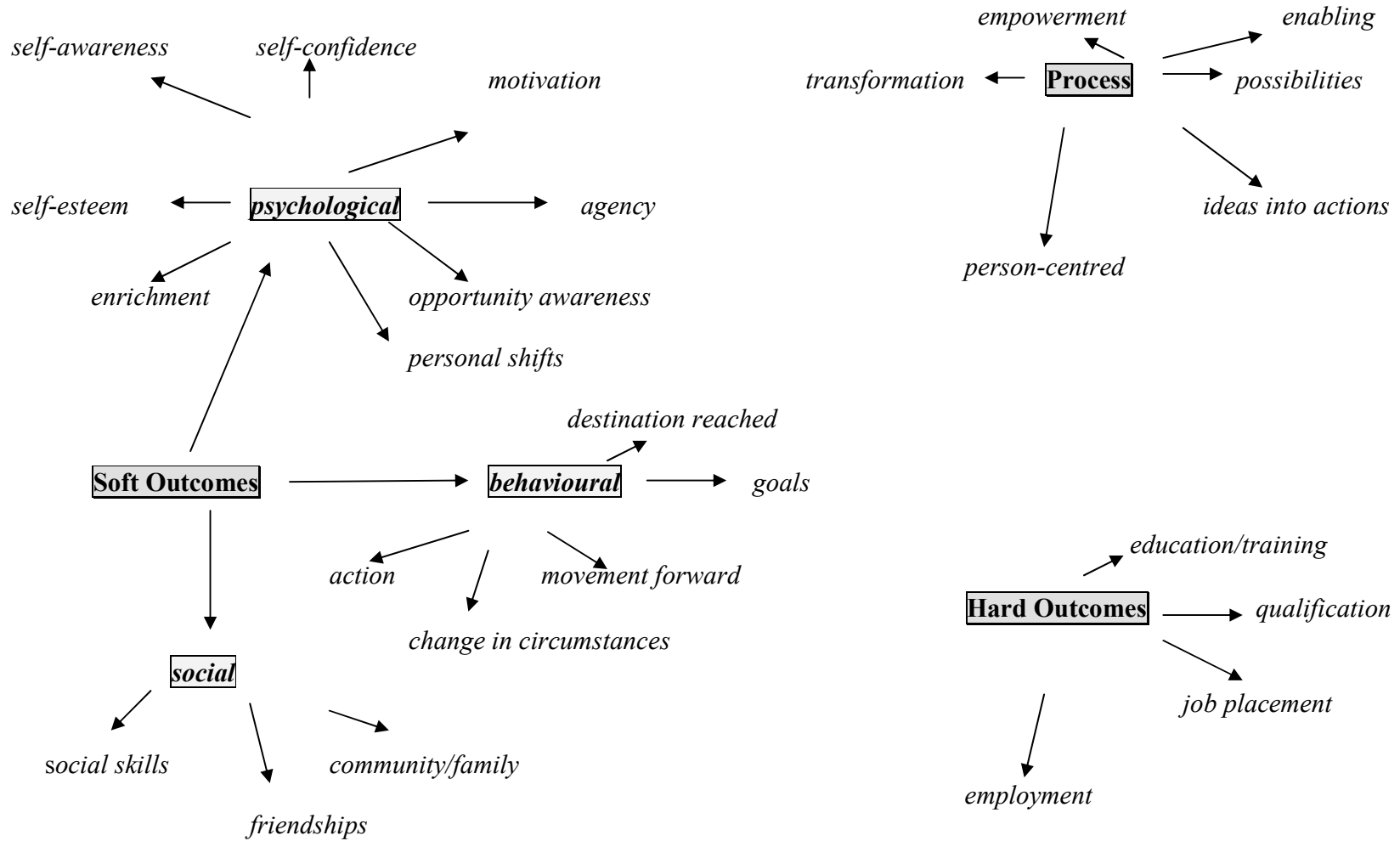
Areas for analysis in the discourse segments:	Conceptual categories	pattern codes
<b>1. Progression Experience</b>		
Exc 1: client's progression experience has been linear	[progression process =	<i>linear</i> ]
Exc 19: one day he would go back to college,	[progression process =	<i>aspirational style</i> ]
Exc 15a: his age made him take a long-term view and be strategic about his future	[progression process =	<i>strategic style</i> ]
Exc 27: his progression has been beyond his expectations	[attitude to progression =	<i>beyond expectations</i> ]
Exc 22: his family also proud of his achievements	[attitude to progression =	<i>family pride</i> ]
Exc 9/10: reached his limit after the four years	[negative aspect =	<i>arduous</i> ]
Exc 43: self-gratification to stretch and challenge himself was important outcome	[positive aspect =	<i>reaching his potential</i> ]
Exc 19: family priorities constantly held him back	[extrinsic factor =	<i>family commitments</i> ]
Exc 12a: determination to get a job after four years of college	[intrinsic factor =	<i>single-mindedness</i> ]
<b>2. Obstacles Encountered</b>		
Exc 3: obstacle was self-doubt about achieving his ambition	[personal obstacle =	<i>low self-confidence</i> ]
Exc 4: found the leap into fulltime third-level particularly challenging	[personal obstacle =	<i>educational leap</i> ]
Exc 4a: felt himself in the minority in comparison to numbers of young students	[personal obstacle =	<i>inferiority complex</i> ]
Exc 6: a major obstacle of balancing fulltime study and fulltime work	[personal obstacle =	<i>juggling workload</i> ]
Exc 7: for him there was no option, finances were the obstacle	[personal obstacle =	<i>financial issue</i> ]
Exc 8: balancing family commitments and study was a continuous obstacle for him	[personal obstacle =	<i>juggling commitments</i> ]
Exc 11: emphasis that sitting exams had also been an obstacle for him all through his studies	[personal obstacle =	<i>exams</i> ]
Exc 15: another personal obstacle was his low self-esteem	[personal obstacle =	<i>low self-esteem</i> ]
Exc 17: early opportunities for education were determined by finances	[personal obstacle =	<i>financial</i> ]
Exc 24/26: time management was difficult with the number of responsibilities	[personal obstacle =	<i>time management</i> ]
Exc 25: pride also was an obstacle, not asking for help when needed	[personal obstacle =	<i>pride</i> ]
Exc 26a: only strategy to keep on track was study in the early hours	[strategy response =	<i>early morning study</i> ]
<b>3. Outcomes of Guidance</b>		
Exc 9a: achieved a national qualification	[hard outcome =	<i>qualification</i> ]
Exc 12: getting a qualification meant a new start for him	[ultimate outcome =	<i>new career</i> ]
Exc 22a: <u>analogy</u> of Maslow's hierarchy to show he has achieved his ambition	[ultimate goal =	<i>ambition achieved</i> ]

Exc 23: ultimate goal was to get a wage and support his family; but do something for him too	[ultimate outcome = [ultimate outcome =	<i>financial security]</i> <i>personal fulfilment]</i>
Exc 5: overcame the obstacle of feeling an outsider (extrinsic context)	[soft outcome =	<i>fitting in]</i>
Exc 28: being thrown in at the deep end was a positive outcome for him	[soft outcome =	<i>challenge]</i>
Exc 29a/31: a change of mindset about entitlement to education a positive outcome	[soft outcome =	<i>worthiness]</i>
Exc 45: achieved listening skills, academic skills, cognitive skills and open-mindedness	[soft outcome =	<i>new skills set]</i>
Exc 19a: time was eventually right for him to return	[client readiness =	<i>right time]</i>
Exc 20: fate played a part in his return to education	[client readiness =	<i>fate]</i>
Exc 40: was <b>ready for education</b> , but needed the encouragement, <u>metaphor</u> of the gun	[client readiness =	<i>ready, but needed push]</i>
Exc 41: new <b>employment</b> meant qualification first to be ready for an area he wanted to work in	[client readiness =	<i>in stages]</i>
Exc 42: broader picture, thinking strategically to improve his long-term situation	[client readiness =	<i>long-term view]</i>
Exc 44: he was only ready for employment two years into college	[client readiness =	<i>progressive readiness]</i>

#### ***4. Client's Contribution to Design of Longitudinal Tracking Survey***

Exc 32: was happy to receive a tracking survey	[response to contact =	<i>happy]</i>
Exc 33: amenable to tracking, esp. as a case study	[amenable to tracking =	<i>yes]</i>
Exc 35: he thinks tracking should be done every three months	[regularity =	<i>every 3 months]</i>
Exc 34: provides a case study example to show others what can be achieved	[purpose =	<i>case study]</i>
Exc 36: he agrees that the process is reciprocal between service and client	[purpose =	<i>reciprocal process]</i>
Exc 39: reiterating that <b>clients have a role</b> by providing examples to others	[purpose =	<i>case studies]</i>
Exc 47: whilst stats are relevant, successful stories should be promoted to encourage learners	[purpose =	<i>encouragement]</i>
Exc 37: questions on promotion, and future learning/employment goals	[o/c measurement =	<i>soft outcomes]</i>
Exc 38: also question to find out if client has any new qualifications / skills	[o/c measurement =	<i>hard outcomes]</i>
Exc 46: outcomes about personal achievement also	[o/c measurement =	<i>personal achievement]</i>
Exc 48: would prefer to be called a client	[language =	<i>client appropriate]</i>
Exc 48a: subjectivity of the client can get lost in the language used by the experts	[language =	<i>loss of subjectivity]</i>
Exc 49: uses the <u>metaphor</u> of a financial transaction for customer/consumer	[language =	<i>financial transaction]</i>
Exc 50: saying here that economic language is incompatible with ethos of education	[language =	<i>incompatibility with learning]</i>

**Appendix O: Conceptual map of progression from practitioner focus group data**



## Appendix P: Secondary documents coding schedule, coding manual and data sets

**Table 1: Coding Schedule for Secondary Data Collection**

<i>Category</i>	<i>Dimensions (themes)</i>	<i>Code</i>		<i>Category</i>	<i>Dimensions (themes)</i>	<i>Code</i>
(i) Lifelong Guidance and Lifelong Learning Goals	Support development of knowledge, skills and competencies	1		(iv) Learning outcomes	Achievement of knowledge, skills and competencies	10
	Contribute to improving the efficiency of education systems	2			Attainment of qualifications	11
	Improve transition between education/training and work	3			Mobility through qualification pathways	12
(ii) Lifelong Guidance and Labour Market Goals	Enhance labour mobility	4		(v) Employment outcomes	Upgrading of skills	13
	Support human capital development	5			Securing work	14
	Assist with economic competitiveness	6			Career mobility	15
(iii) Lifelong Guidance and Social Equity Goals	Support social inclusion of the disadvantaged	7		(vi) Personal outcomes	Achievement of personal potential	16
	Equality of access to IAG	8			Lifelong career management skills	17
	Promote active citizenship	9			Actively contribute to society	18
					Improved wellbeing	19

**Table 2: Coding Manual for Secondary Data**

Key: AG = Adult Guidance; LLG = Lifelong Guidance; LLL = Lifelong Learning; IAG = Information, Advice and Guidance

Document Titles	Document Type	Position of Adult Guidance in Document	Role of Lifelong Guidance to support 3 Public Policy Goals (Dimension Codes 1 – 9)	Construction of Progression (Dimension Codes 10 – 19)
<b>Type 1</b>				
A). NDP 2007-2013 (Gov of Irl., 2007)	National Economic Plan	AG, or IAG in general, not positioned in document. LLL not mentioned at all.		10, 12 13, 14
B). Programme for Prosperity and Fairness (PPF): Towards 2016 (Dept. of the Taoiseach, 2006)	Government and Social Partners Policy Framework	AG not positioned. IAG marginally referred to in general terms in various education and employment initiatives. LLL key principle of investment in human capital.		10, 11, 12 13, 14, 15 17, 18
C). National Framework of Qualifications (NQAI, 2003)	Government Policy framework	AG not referred to. IAG used in general terms as part of the framework to support learners LLL key priority.		11, 12 14 16, 18
D). NDP 2000-2006 (Gov of Irl., 2000)	National Economic Plan	“Guidance” strongly positioned as one of the social inclusion measures for employability within LLL agenda.	1, 3 4, 5, 6 7, 8	10, 11 13, 14 19
E). PPF 2000-2002 (Dept. of the Taoiseach, 1999)	Government and Social Partners Policy Framework	AG has strong position – identified as one of the key actions under Lifelong Learning (Framework IV)	1, 2, 3 4, 5, 6 7, 8, 9	10, 11, 12 13, 14, 15 16, 17, 18, 19
<b>Type 2</b>				
F). National Employment Action Plan (DETE, 2004)	Departmental Policy Plan	AG not positioned here. IAG has marginal position, referred to only in relation to some national employment initiatives. LLL and human capital investment a priority.	1, 3 4, 5, 6 7	10, 11, 12 13, 14, 15 16, 17
G). White Paper on Adult Education (DES, 2000)	Departmental policy plan	AG has strong position - referred to directly as support service in LLL agenda.	1, 2, 3 4, 5, 6 7, 8, 9	10, 11, 12 13, 14, 15 16, 18

<i>H). Green Paper: Adult Education in an Era of Learning (DES, 1998)</i>	Departmental policy plan	AG has strong position – recommended as integral part of adult education policy. LLL key principle.	1, 3 4, 5, 6 7, 8	10, 11, 12 13, 14 16, 19
<i>I). White Paper: Human Resource Development (DEE, 1997)</i>	Departmental policy plan	AG marginal. Only in terms of FAS and LES provision. LLL positioned.	1, 3 4, 5, 6 7, 8	10, 11, 12 13, 14, 15 16, 17, 19
<b>Type 3</b>				
<i>J). National Skills Bulletin 2008 (Behan et al, 2008)</i>	Policy Report	AG not positioned. LLL not referred to.		10, 11, 12 13, 14
<i>K). Annual Competitiveness Report, Benchmarking Ireland's Performance (NCC, 2007)</i>	Policy Report	AG, or IAG in general, not positioned in document. LLL brief mention.		10, 11 13, 14
<i>L). Tomorrow's Skills: Towards a National Skills Strategy (Expert Group on Future Skills Needs, 2007)</i>	Policy Report	AG has relatively strong position – referred to in overall context of national IAG provision across all sectors. LLL priority area.	1 4, 5, 6 7, 8, 9	10, 11, 12 13, 14
<i>M). Report of the Taskforce on Lifelong Learning (DETE, 2002)</i>	Policy Report	AG strong position as document is focused on adults. IAG essential element in Lifelong Learning framework	1, 2, 3 4, 5, 6 7, 8, 9	10, 11, 12 13, 14, 15 16, 17, 18
<i>N). Alleviating Labour Shortages (NESF, 2000)</i>	Policy Report	AG marginal. Only in terms of IAG provision through FAS NES. LLL referred to as part of employment policy.	1 4, 6 7	10, 12 13, 14, 15 17
<b>Type 4</b>				
<i>O). Guidance for Life (NGF, 2007a)</i>	Collaborative Policy Framework	AG strongly positioned as the final stage of the lifelong guidance framework. Part of LLL agenda.	1, 2, 3 4, 5, 6 7, 8, 9	10, 11, 12 13, 14, 15 16, 17, 18, 19
<i>P). Careers and Labour Market Information in Ireland (Philips et al, 2006)</i>	IAG Review	AG has strong position – recommended it be part of a national lifelong guidance framework. LLL key priority area.	1, 3 4 7, 8	10, 11, 12 13, 14, 15 17

<i>Q). Review of Career Guidance Policies; Ireland Country Note (OECD, 2002)</i>	IAG Policy Review	AG has strong position - referred to directly in terms of AEGI & FAS. Strengthening of IAG required in LLL context.	2, 3 5 8	12 13, 14 17
<i>R). Guidance in Adult and Continuing Education (McNamara,, 1998)</i>	AG Review	AG has strong position within the lifelong learning agenda	1, 3 4, 5, 6 7, 8, 9	10, 12 14, 15 16, 17

**Table 3: Secondary Data Sets**

<i>Codes:</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>	<i>6</i>	<i>7</i>	<i>8</i>	<i>9</i>		<i>10</i>	<i>11</i>	<i>12</i>	<i>13</i>	<i>14</i>	<i>15</i>	<i>16</i>	<i>17</i>	<i>18</i>	<i>19</i>
<b>Docs</b>																				
										<b>Docs</b>										
										<b>A)</b>	√		√	√	√					
										<b>B)</b>	√	√	√	√	√	√				
										<b>C)</b>		√	√		√		√		√	
<b>D)</b>	√		√	√	√	√	√	√		<b>D)</b>	√	√		√	√					√
<b>E)</b>	√	√	√	√	√	√	√	√	√	<b>E)</b>	√	√	√	√	√	√	√	√	√	√
<b>F)</b>	√		√	√	√	√	√			<b>F)</b>	√	√	√	√	√	√	√	√		
<b>G)</b>	√	√	√	√	√	√	√	√	√	<b>G)</b>	√	√	√	√	√	√	√		√	
<b>H)</b>	√		√	√	√	√	√	√		<b>H)</b>	√	√	√	√	√		√			√
<b>I)</b>	√		√	√	√	√	√	√		<b>I)</b>	√	√	√	√	√	√	√	√		√
										<b>J)</b>	√	√	√	√	√					
										<b>K)</b>	√	√		√	√					
<b>L)</b>	√			√	√	√	√	√	√	<b>L)</b>	√	√	√	√	√					
<b>M)</b>	√	√	√	√	√	√	√	√	√	<b>M)</b>	√	√	√	√	√	√	√	√	√	
<b>N)</b>	√			√		√	√			<b>N)</b>	√		√	√	√	√		√		
<b>O)</b>	√	√	√	√	√	√	√	√	√	<b>O)</b>	√	√	√	√	√	√	√	√	√	√
<b>P)</b>	√		√	√			√	√		<b>P)</b>	√	√	√	√	√	√		√		
<b>Q)</b>		√	√		√			√		<b>Q)</b>			√	√	√			√		
<b>R)</b>	√		√	√	√	√	√	√	√	<b>R)</b>	√		√		√	√	√	√		
<b>Totals:</b>	<b>12</b>	<b>5</b>	<b>11</b>	<b>12</b>	<b>11</b>	<b>11</b>	<b>12</b>	<b>11</b>	<b>6</b>		<b>16</b>	<b>14</b>	<b>16</b>	<b>16</b>	<b>18</b>	<b>10</b>	<b>9</b>	<b>9</b>	<b>5</b>	<b>5</b>