

# CASE STUDY

Self Management For

Guidance Practitioners:

A Fine Balancing Act



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## Competence

Manage own caseload and maintain user records.

This involves creating and maintaining user records, using records to support progress, prioritising use of own time and resources.

## Abstract/Introduction/Background

This case study is designed as a method for exploring Self-Management in Career Guidance Counselling. It is related to the CEDEFOP (European Centre for the Development of Vocational Training) competency *Manage Own Caseload and Maintain User Records* and more broadly, as a Supporting Competency within the CEDEFOP framework. The case study is broken into two parts; the first part describes the context and responsibilities which are typically attributed to the work of a Guidance Practitioner. The second part of the case study tells the story of the important relationship between the client and the practitioner. It highlights the common conflict between a Guidance Practitioner's theoretical approach and the responsibility to comply with various contractual obligations. This case study was produced by Ballymun Job Centre and offers an interesting basis for discussion and stimulation among Guidance Practitioners.

## Key Words

- Employment First Approach
- Labour Market Activation
- Upskilling, Further Training and Education
- Guidance Practitioner
- Job Seeker
- Person Centred Guidance.

## Key Characters

**Guidance Practitioner, Emma.** Emma is a career guidance practitioner in a local employment service in Dublin, Ireland. Emma has over five years' experience of working with long term unemployed individuals who typically access employment services, with a number of challenging barriers to training, education and employment. Emma recently achieved a Higher Diploma in Adult Guidance and Counselling and she is passionate about helping those in disadvantaged areas, to identify and further develop their innate skills and attributes as relevant to the world of work.

**Job Seeker, Laura.** Laura is 48 female job seeker who has been unemployed for over four years. Laura is an intelligent and diligent person who through years of unemployment, has lost confidence in her own abilities. Laura presents with a sense of hopelessness and failure and is unsure about her future employment prospects.

## The Case Study Story

### Background

In this case study the labour market activation policy of the Government requires unemployed job seekers to be actively seeking and available for work. In order to continue to receive unemployment payments the job seeker must demonstrate they are taking steps to find employment. The Government Department responsible for labour market activation contract local organisations to provide employment supports to job seekers involved in the labour market activation programme. The job seekers are referred to the contract service and is obliged to attend meetings with guidance staff and may lose benefits if they do not attend. The contracted services operate in areas where levels of high unemployment and in particular youth unemployment are historically endemic. The profile of clients referred for employment support services are defined as long and short-term unemployed activation jobseekers aged 18 to 65. In addition, the services also provide support to one parent families, those with disabilities and illnesses, retired people and new communities. The contracted Employment Support Services work with clients to assist and support them to avail of employment, training and further education opportunities.

Within these three strands lay additional supports which can be accessed by clients including Pre and Post-employment supports, access to state funding for training and education and external referrals for additional supports such as Counselling Support and support for addiction related challenges.

In the contracted employment support services, guidance staff are obliged to meet with activation job seekers on a monthly basis for what is known as 'Activation Review Meetings'. These guidance and support meetings are designed to assess a person's progression in relation to job searching, up-skilling and/or further training and education. In the Government activation programme, there is an emphasis on an Employment First approach that the contracted services are asked to follow.

### Client Caseload and the day to day work of a Dublin Based Guidance Practitioner

Emma is one of the guidance staff working in the contracted service and meets with job seekers sent to the service as part of the labour market activation. Emma works with a caseload of 120 clients at any one time. She is required to provide the same level of career guidance and support to each of her clients. Working with so many clients simultaneously means that she is responsible for a very large amount of administrative work which is a crucial task to keep the work of the organisation running smoothly. Below is an outline of the tasks and duties assigned by Emma's Line Management in relation to operating a very busy and diverse caseload.

Guidance Practitioners in the contracted services must be highly organised, great with details, good at problem-solving and flexible. They must also thrive on making things run well to support the overall mission of their organisation. This requires a willingness and acceptance of the many company and contractual administrative tasks and duties which accompany a large caseload. Guidance Practitioners must also maintain and duplicate administrative and data entry work across two databases, one external and one internal, to record client activity within the business model.

Guidance staff in the contracted services must record their interactions with activated job seeker on Government Departments computer system used for processing claims and customer payments across all schemes and programmes for unemployed people in the state. In addition to updating this system, the Guidance Practitioners also have the responsibility of updating an internal Customer Relationship Management (CRM) system to record client activity within their specific service.

Both systems require regular input of client information which must be confidential and factual only. This requires Emma to exercise a great degree of professional discretion and confidentiality when it comes to inputting and retaining client information. Notes and data inputted by her onto the Department's system may have repercussions for retention of client welfare payments and potential investigation and therefore must be

accurate at all times. Maintaining accurate records in this regard also comes with added pressure for Emma who already works in a fast-paced, hectic and often chaotic environment. Regulations imposed by the contract require Guidance Practitioners to report on the Department's system, clients who do not attend appointments or engage under the Activation Model for good reason. This can cause particular difficulty in the client/practitioner relationship where a confidential and empathetic relationship has been forged and where a certain level of mutual trust has evolved to support and act in the best interests of both individuals.

As a guidance practitioner working and as a consequence of working within contracted services, Emma therefore becomes involved in the process of the job seekers level of engagement with the contracted service and if they should lose some or all of their job seeker payment. During this process Emma must engage with the Department staff via email and phone and list reasons for non-compliance by the client. Involvement in this process has the potential to damage the client/practitioner relationship, in some cases beyond repair. Emma has reported that this has created tension across working relationships with her clients in the past.

In addition to administrative tasks, Emma must have strong time management skills and must be able to multi-task. An average day consists of her seeing five or more clients, completing registration forms and taking details which must be immediately loaded onto the relevant databases to record relevant and up to date client activity. This is vital if quarterly reports are to reflect accurate statistics and client-engagement models.

Emma will also liaise quite regularly via telephone and email in response to queries that come into the organisation from her own clients, employers, trainers, colleges and other bodies and she will also make a considerable amount of internal calls and referrals to fellow staff members for service delivery purposes. She is required to regularly attend team meetings with her Line Manager, note minutes of meetings, complete timesheets, appraisal forms, complete any other ad hoc duties imposed, usually at short notice during the year. All of these tasks fall on top of retaining an active and busy caseload of clients. It is also expected that she continues with professional development and any other relevant training that becomes available or is offered directly.

### **Delivering Good Guidance**

In addition to the above responsibilities, Emma endeavours to work with all of her clients in a holistic manner, regardless of how they have approached the service and to help them to develop a Personal Progression Plan. These individual action plans allow clients to set career goals while remaining engaged, fulfilled and enthusiastic about their future. She assists them to agree actions around job searching, CV and cover letter preparation. She also helps them to practise interview skills and techniques, source industry standard training, state funding, up-skill and identifying further educational opportunities. Each action subsequently improves the future employability of the client.

Where deeper guidance is required with some clients, Emma works to motivate them to look at their self-value, self-worth, transferrable skill-set and professional capacity. She imparts guidance and counselling skills such as empathy, active listening and reflection coupled with unconditional positive regard, encouragement and positive feedback to help change indecisive thinking and uncertainty.

Use of these guidance skills and techniques allows a client to become more positive and open to change. Such an approach is mutually beneficial to the guidance process for both the client and Emma. Working to deliver good quality career guidance whilst observing contractual requirements and limitations can be a fine balancing act between what best practice is and what is mandated.

### **Laura's Story**

Laura is a 48-year-old female jobseeker who first met with Emma in 2017. She was referred to the contracted services by the Department under the job seekers labour market activation programme. She is categorised as long-term unemployed since 2010. She had been employed in various capacities over the years. She had worked as a Junior Education Liaison Officer, General Operative and in a Customer Service support position

for a short period of time. Some of these jobs were undertaken in other European countries and her last employment was in Ireland. Emma's first impression of Laura was that she was down to earth, jovial and friendly. She was a thinker, a talker and a self-styled realist. Despite these positive qualities, she seemed lonely and troubled. She lived alone in a property which she describes as just about habitable. Laura's appearance was unkempt and she was dishevelled. She often apologized for her appearance and attributed it to the "negative effects of loneliness and long-term unemployment". When a client presents in this state, they have an up-hill battle to climb and it takes time and many guidance sessions to help them work through the many difficulties and distresses they encounter on a daily basis, the dissatisfaction with life and loss of purpose that has become so familiar to them. Emma is an experienced Guidance Practitioner who works with her clients in an eclectic way, drawing on different theories, concepts, counselling skills and approaches which best fit individual circumstances, as someone moves through the guidance and counselling process.

In the first few guidance sessions with Laura, Emma used a *Person-Centred Empathetic Approach (Carl Rogers)* as they gradually became more familiar with one another.<sup>1</sup> Later on, in the therapeutic relationship, she negotiated a more *Pluralistic and Collaborative Approach* to support and guide her through her individual journey.<sup>2</sup>

Emma used the guidance skills of open questioning and listening with empathy which allowed her to observe and attend to Laura in such a way that she developed a greater understanding of her and her world. Laura revealed to Emma that she had been experiencing a terrible sense of loss due to losing her identity as an 'employee' and had a lack of social contact with the outside world since becoming long-term unemployed. Her friendships had all but disappeared as many of her companions had moved abroad during Ireland's recession and have since moved on with their lives. In comparison, Laura would tell Emma that she felt like a failure and had felt increasingly isolated, helpless and hopeless. Any prospect of turning her life around and obtaining a job seemed out of reach. Taking an ethical standpoint allowed Emma to understand, respect and respond to the power and potential that Laura already held but which had been un-tapped for a significant period of time. It was clear to Emma even from very early on in the guidance sessions, that Laura was capable and intelligent but lacked the motivation to push herself forward.

She was keen for Laura to overcome her overriding sense of hopelessness, anxiety and resultant depression that had set in over the years due to loneliness and unemployment. She knew this would take time and patience on both their parts.

Over a number of guidance sessions Emma decided to introduce to her the possibility of engagement in training, education or employment. She gave her support and guidance without being overly directive. This empowered and motivated Laura and she began to question what her first steps might be rather than Emma telling her what they would be. She spoke to her about her soft skills which could be applied to any job such as time management and communication. She was keen to point out to her that what she didn't know, she could learn and coupled with time and hard work, the skill set she had from previous employments could be easily

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<sup>1</sup> Person-centred therapy, also known as person-centred psychotherapy, person-centred counselling, client-centred therapy and Rogerian psychotherapy, is a form of psychotherapy developed by psychologist Carl Rogers beginning in the 1940s and extending into the 1980s. Person-centred therapy seeks to facilitate a client's self-actualizing tendency, "an inbuilt proclivity toward growth and fulfilment", via acceptance, therapist congruence, and empathic understanding

<sup>2</sup> The Pluralistic approach to guidance counselling suggests that different interventions or ways of working are likely to help different people at different times, so there is no best way to practice per se. At the centre of this model lies "collaborative pluralism" where the counsellor and client seek to work closely together in a more focused way and less directive way.

transferred into other roles.

However, Emma noticed that each time she moved to explore a more definite option; Laura would immediately revert back to a familiar place where she lacked confidence in her own abilities. She took her time, showing empathy and understanding for her predicament and gently made her aware of various work placement programmes that she could avail of which would bridge the gap from her last employment in 2008.

She was conscious too that Laura's age was something which played on her mind constantly whilst being unemployed and that she had in the past, attempted to undertake an Arts Degree, but had dropped out after only a few months. She wasn't keen to repeat this experience so returning to education wasn't an option she would readily consider.

Laura would often present at guidance sessions in an anxious state, fearing that she had to have a plan of action pulled together or something to show Emma, and she was frightened that her unemployment payment may be reduced or cut if she did not take action soon. She would leave her guidance appointments in two minds. A little more positive but also unconvinced. She would apologise for seeming "flaky, fickle and indecisive".

As time began to move on, Emma was conscious of the time and future commitment it would take to engage Laura in any positive interventions which would be deemed as satisfactory by the Government Department, in terms of meaningful engagement by Laura with the unemployment activation process. At the same time, Emma was also experiencing pressure within her organisation to take on additional new clients. She was already feeling overwhelmed with an ever-growing and active caseload and the accompanying administration to be completed for each client.

Laura would ebb and flow from positivity to negativity over the next few guidance sessions but finally decided to undertake a community based state funded employment placement programme for unemployed job seekers where she would work in a local service which she was already familiar with. By chance a position had been created and she felt comfortable in an office environment in which she was gaining additional skills, experience and knowledge. This clerical role provided her with in-house training and an opportunity to socialise and network. Accepting the placement also helped alleviate the pressure she was feeling from Government Department's job first approach to "do something".

While on the employment placement Laura would no longer be in receipt of job seeker's welfare payment for a year and was employed on a part-time basis with the Local Community Service. This gave her a bit of breathing space and time to reflect on where she was and what she might look to do in the year ahead.

### **Concluding Laura's Story**

At the time of writing, Laura has now finished her work placement. Emma has met with her on a few occasions to discuss what her next moves might be. The one year employment placement had provided her with the perfect chance to re-learn about herself in the work environment. It had given her some much needed structure to her life and most importantly the opportunity to socialise and network with other people.

As her Guidance Practitioner, Emma has also noticed a significant shift in terms of her mood and general demeanour. She has a certain spring in her step and she generally seems more upbeat. She is however concerned that she will have to apply for job seeker's payments and has a huge desire not to return to that "dark place" as she calls it. Now that Laura is in a different space, Emma is keen to prevent her from returning to feeling hopeless and helpless about her life. She has spoken to her about where she was a year ago and how with time, things can change when you make a positive difference to your life. She has also since reflected back to Laura, the pattern of helplessness she had displayed in relation to many events in her life.

Taking this on board, she has communicated to Emma that she realised that, along with her unemployment

and other difficulties that caused her problems in the short term, she also recognised how she experienced those events i.e. her proclivity to blame others and avoid personal responsibility lead to longer-term problems. Emma has begun to encourage Laura to learn to understand how her negative responses to life events can lead to psychological discomfort and resultant anxiety.

With a broadened mind and greater self-awareness, Laura is more ready to accept the negative and positive aspects of herself in tandem with one another. She is aware that she does not yet have a much-coveted job but feels capable of finding solutions to her problems and acknowledging how she feels in the moment and addressing it with positive action.

During a more recent guidance session, Emma has spoken to Laura in more detail about choosing a career and training that will be a good fit for her personality type. Career Assessment Tools used with Laura have revealed that she has a keen interest in both investigative and conventional career fields. She has since applied for a Researcher position and a place on a Legal Administration course in Dublin and is waiting on an outcome from both applications.

Working to deliver good quality career guidance whilst observing comprehensive administration, contractual requirements and limitations can be a fine balancing act between what best practice is and what is mandated. Emma needs to negotiate a way to manage her administrative responsibilities whilst managing a large caseload of clients and remaining committed to the procedural agreement as an employee of a contracted employment service.

## Questions, Comments and Topics of Discussion

- Emma recognises that progression for clients like Laura can be a lengthy process
- She is overwhelmed from an already extensive and demanding caseload
- She needs to negotiate a way to manage all of her administrative responsibilities and time management with an extensive caseload while remaining committed to delivering good quality career guidance to each client that she meets.
- She must remain committed to the contractual agreement imposed by the contract between her organisation and the Government Department, whilst continuing to provide quality career guidance to Laura and all other clients

### Suggested Topic for Discussion

“Working to deliver good quality career guidance whilst observing contractual requirements and limitations can be a fine balancing act between what best practice is and what is mandated.”

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