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"Let Your Fingers Do the Walking": the Use of Telephone Helplines in Career Information and Guidance

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ABSTRACT

The UK Learndirect helpline, launched in February 1998, is the largest telephone helpline service in the guidance field so far developed in the world. By the end of 2000 it had responded to 2.4 million calls. The development of the helpline is placed in the context of the transformations in service delivery in other sectors, including the growth of callcentres and helplines. The use of the telephone in career guidance, both in the UK and elsewhere, is reviewed. The evolution of Learndirect is described, with particular attention to its policy context. The current operation of the service is outlined, including its extent, availability, staffing and users. Finally, a number of issues illuminated by the experiences of Learndirect are identified, including the place of in-depth guidance within helpline services, their relationship to wider guidance provision, their impartiality, their framing in relation to national/local, adult/all-age and learning/career dimensions, the synergy of helplines with other forms of technically mediated service delivery, and the implications of helpline work for the professional development of guidance staff.

Transformations in service delivery

The growth of helplines and other forms of technically mediated service delivery (websites, e-mail, etc.) in the career guidance field can be linked to the transformations taking place in patterns of service delivery in other sectors. These sectoral transformations are infectious, because they shape the wider expectations of consumers. Increasingly, it seems, consumers want a service to be available when they identify a need for it, with minimum delay and minimum effort: they want it *here*, and they want it *now*. This does not mean that they are unwilling to undertake visits to dedicated physical locations where this offers added value, either through face-to-face interaction or through access to physical resources (e.g. in the case of shopping, being able to see and touch particular goods). But their "decision rules" in these respects are becoming more and more discriminating.

Helplines are not new. The origins of the Samaritans service, aimed at individuals in crisis or considering suicide, go back to the 1950s (Varah, 1988). But helplines have grown massively in recent years. The first UK *Directory of Helplines*, issued in 1996 by the Telephone Helplines Association, listed some 800 national, regional and local services which claimed to follow helpline standards for good practice (Rosenfield, 1997) (this figure is reported by the Association to have since risen to around 1,000). Moreover, there has been a huge growth of commercial callcentres, which are now one of the fastest-growing employment sectors: it is estimated that by 2005, over 3% of the UK's working population will be employed in over 8,500 callcentres (Datamonitor, 2000).

A strong example of the use of the telephone in transforming service delivery is banking. Traditional banks have increasingly been replaced by automated cash machines and by use of telephone and web-based banking services for accessing bank statements, moving money between accounts, and other transactions. The result has been a reduction in the number of "bricks and mortar" high-street banks, which were viewed as being both expensive and inessential for the "anywhere, anytime" orientation of electronic banking (Cunningham & Fröschl, 1999). Subsequently there has been some drawing back from this trend, and a move to secure an appropriate mix of "bricks" and "clicks" (Gulati & Garino, 2000). Similar transformations are taking place in other business sectors, seeking a "channel advantage" based on maximising the distinctive strengths of different sales channels (Friedman & Furey, 1999).

A further example in the public-service sector is the National Health Service, which has recently introduced a 24-hour telephone advice line. Staffed by nurses, NHS Direct is designed to provide

easier and faster advice and information about health, illness and the NHS itself. Its objectives include encouraging self-care at home and reducing unnecessary demand on other NHS services. An important role of NHS Direct is triage: identifying degrees of urgency for treatment (McLennan, 1999). Following pilot trials (Munro *et al.*, 2000), the service was extended in late 2000 to cover the whole of England. A statement in November 2000 indicated that the helpline was already taking an average of 60,000 calls a week and that this figure was expected to rise shortly to 100,000 – i.e. over 5 million per year, compared with around 1 million patients consulting GPs (BMA, 2000). It is possible that NHS Direct could in future become the first port of call for all primary-care services (Kendall, 2001).

Why has the use of the telephone for service delivery grown so rapidly? After all, it was invented by Alexander Graham Bell in 1876, so it is hardly "new technology" (for a wide-ranging series of essays on its long-term social impact, see de Sola Pool, 1977). There seem to be at least three explanations. One is the much more extensive *availability* of telephones – the proportion of households with home telephones rose from around one-third in 1970 to 95% in 1999/00 (ONS, 2001, p.233) – now significantly enhanced by the massive growth of mobile phones. A second is the much more sophisticated *support technology* now available for, for example, routing calls, diverting them into or out of precoded voice response systems, and providing database support for callcentre staff. A third is *cultural change*, linked in particular to the growth of consumerism, and the trend towards a "24-hour society" in which work and other activities are not confined to specified hours.

Also pertinent are the knock-on effects of websites and e-mail, which similarly are encouraging providers and consumers to expect new and more immediate forms of service delivery. Hitherto the telephone, the computer and television have been viewed as separate technologies. But the advent of digital technology and enhanced bandwidth means that these three separate "analogue streams" are now converging into an integrated "digital river" (Cunningham & Fröschl, 1999). The potential implications of this are profound and will be considered towards the end of this paper.

Clearly, then, the telephone is now being used for a wide range of service provision. At one end of the spectrum are services comprising a menu leading to a series of pre-coded messages, or direct contact with a member of the callcentre staff who is encouraged to minimise call length and work within a series of prescribed "scripts". At the other end are highly interactive engagements with skilled professionals (Huws & Denbigh, 1999). Within a helping context, the telephone can be used for a variety of interventions, ranging from information and advice, through support,

befriending and advocacy, to counselling (Rosenfield, 1997). Even deep and long-term counselling work can be carried out over the telephone, not only with individuals but also with groups (Rosenfield & Smillie, 1998).

For helping purposes, the telephone clearly has both advantages and disadvantages in relation to face-to-face interactions. Its disadvantages include the lack of access to visual cues like facial expressions and body language, and the risk of differentiated environmental distractions – both of which can lead to miscommunication. Its advantages include its greater accessibility and flexibility. Some clients also seem to prefer its anonymity, and the greater equality provided by the fact that both parties are on their own territory and the client can easily terminate the call at any time by hanging up (Lester, 1977). It has further been suggested that telephone interactions can be more focused and purposeful than face-to-face contacts (George, 1998). The effective use of the telephone requires, and therefore encourages, discipline concerning time, structure, and checking the accuracy of what is communicated. The lack of access to visual cues can be compensated by greater attention to aural cues. These can accurately convey a wide range of signals (Rutter & Robinson, 1981). Helpers require strong listening and counselling skills, attuned to the distinctive constraints of the telephone (Rosenfield, 1997).

Applications in career guidance

Changes in service delivery in other sectors are likely to affect the expectations of those who are looking for help with career decisions and transitions. Reardon *et al.* (2000) suggest that such individuals increasingly need to be viewed not as "clients" but as "career shoppers". They may engage in such "shopping" at varied times and places, and often want to preview or try out services before they "buy" or "buy into" them. They are commonly looking for "bargains" and "value", and frequently place limits on the time they are prepared to invest.

Some use is already made of the telephone in guidance work. Indeed, Tait (1999) argues that "the telephone has become normalised as a medium for guidance and counselling in ways which have yet to happen in the case of computer-mediated communication" (p.114). The Open University, for example, has long used the telephone for guidance as well as tutorial purposes (Robinson, 1984; Simpson, 2000). Ratings for telephone tutorials tend to be a little lower than for face-to-face tutorials, but substantially higher than for computer conferencing (data provided by the Open University). Any career guidance offered has usually been embedded within wider student support and guidance services. Current provision includes a Telephone Evening Advice line operated from three of the university's Regional Centres: one of these has a careers adviser available.

Other more specifically career-related examples in the UK include the national Careerline service operated by the Association of Graduate Careers Advisory Services since 1989. It has run from 3.00pm to 8.00pm on Tuesdays to Thursdays, each of the three days being serviced by the careers advisers in one of the three host universities. It was initially viewed as part of a "mutual aid" service which focused particularly on graduates for up to three years after graduation, with particular concern for students unable to gain physical access to a higher education careers service through their geographical location or other circumstances (e.g. disability); its users are not, however, confined to this group. A Services to Graduates Project funded by the Higher Education Careers Services Unit is looking at the possibility of extending the Careerline service into a nationally available single-number network with improved access, alongside development into other media such as e-mail and webcam technologies to provide on-line advice and guidance (Madahar, 2000).

Prior to the establishment of Learndirect, there were also a number of other telephone helpline initiatives. Some were linked to particular broadcasting campaigns – for example, Adult Learners' Week. Others were local learning-opportunity helplines funded by Training and Enterprise Councils. Both of these categories have now been largely replaced by Learndirect.

Overseas, the main early reported applications were in the USA, as part of the concept of "educational brokering" (Heffernan *et al.*, 1976), linking adults to learning opportunities. The most ambitious early effort to provide career counselling via telephone was the home-based career education model programme located in Rhode Island, aimed particularly at home-based women (Arbeiter *et al.*, 1978). Other experimental telephone-based services tended similarly to be aimed at groups unable to access face-to-face services because they were home-based, or were based in rural areas, or for other reasons (Roach *et al.*, 1983; Heppner *et al.*, 1988).

A trawl of contacts in Australasia, North America and Scandinavia suggests that the main current examples of career-related telephone helplines are in Canada and New Zealand. In Canada, there are three provincial career information hotlines: in Alberta, Newfoundland and Saskatchewan. Each is staffed by 3-5 specialists. Telephone guidance is also used in rural communities (Cahill & Martland, 1997) and in multi-site companies (Leduc, 2000), and is used widely in North America in executive coaching, including career coaching (Harrington, 1998). In New Zealand, a pilot has taken place of a new CareerPoint telephone helpline service to be run by the publicly-funded Career Services as part of its range of services, which also includes 16 career centres and a training and job information website. The pilot was based in part on the Learndirect model, though it is more strongly integrated into a comprehensive service, is designed as a "career" rather than a

"learning" helpline, and is aimed at people of all ages (Adair *et al.*, 2000). Following the pilot, the New Zealand Government has confirmed ongoing funding for the service.

These various services indicate the variety of ways in which the telephone can be used in career guidance delivery. Some of the services have been promoted essentially as *information* services; others as career *counselling* services. Some are focused primarily on *learning* or *work*; others on *career*, embracing the two. Some are aimed at *young people* or *adults*; others are *all-age*. Some are *separate* services based in small call centres; others are *integrated* in various ways into more broadly-based services. Some are viewed at least partly as *portals* into face-to-face services (e.g. Adair *et al.*, 2000); conversely, others are seen as flexible ways of *sustaining* a long-term helping relationship which is likely to start on a face-to-face basis (e.g. Harrington, 1998). These contrasts identify some of the range of options within which the design of Learndirect was located, and will be revisited as issues later in the paper.

The evolution of Learndirect

The notion of a national helpline on learning opportunities emerged from the adult education field in the early 1990s. One of the tasks undertaken by the National Educational Guidance Initiative, funded by the Government from 1988 to 1993, was to develop a blueprint for a national educational guidance helpline. As part of this work, a feasibility study was carried out in 1992/93 (NEGI, 1994). In addition, close links were developed with BBC Education's helpline in support of its Second Chance initiative. In Scotland, a report from the Scottish Office (1996) noted that local guidance helplines had been established in three regions – Strathclyde, Central and Fife. It also cited reports from AEGIS (n.d.) and from HM Inspectors of Schools (1996) as concluding that a national adult guidance helpline, linked to effective local guidance networks, would enhance the current provision of guidance services across Scotland. It accordingly proposed the development of such a helpline, which "would feature objective guidance, offered by trained staff, on educational and training opportunities to clients across Scotland" and would refer enquiries, where appropriate, to staff in local guidance networks (p.10). Professional responses to the document acknowledged the marketing potential of the proposed helpline for raising the profile of adult guidance and targeting non-participating groups. They tended, however, to seek to restrict the helpline's delivery role:

"As a general rule we do not feel that it is possible or appropriate to give guidance over the telephone. Any national facility should be quite clear that its role is to provide information and

signposting. Guidance activities such as enabling, advocacy, help in decision making and counselling are best handled on a face to face basis" (response from Guidance Networks in Fife).

Meanwhile, building upon the NEGI work in England, a consultation paper prepared by the National Advisory Council for Careers and Educational Guidance (NACCEG, 1996) on a national strategy for adult guidance noted that "local telephone helplines – supported by skilled staff and communications technology – help to meet and direct demand at the critical moment when an individual is motivated to make an enquiry". It argued that "such helplines can provide an efficient response – and at less cost than a face-to-face enquiry – as experience in universities and elsewhere shows" (though it gave no specific reference for this statement). It recommended that "a key element in promoting national coherence between services would be a permanent national telephone helpline, routing enquiries where appropriate to relevant local helplines" (p.4). This proposal was located as part of a "universal foundation service", focusing mainly on information and signposting; this would be free to the user, but would then lead to a range of fee-charged specialised guidance services. The two-level model outlined here had been developed in earlier reports (TEC National Council, 1994; Watts, 1994), and became known as the "free to enter, pay to stay" model.

The decision to set up a "learning line" was announced in November 1996 by the then Minister for Lifelong Learning, James Paice, as part of a strategy based on the two-level model. The helpline was to be linked to Local Information Networks (LINs), which would be responsible for bringing the ailing network of local computer-based Training Access Points up to a uniform quality standard and also for operating local helplines able to handle enquiries generated by the national line. The helpline service would be free and confidential, would use skilled advisers, would have extended opening hours, and would offer information on courses and careers. To design the helpline, the Department for Education and Employment invited NACCEG (now commonly known as the Guidance Council) to set up an advisory group. Chaired by Lucia Jones, then Head of Education Policy at the BBC, the group recommended that the helpline should provide a uniform service across the UK, so that the telephone number would be trailable by national broadcasters. Calls should however be answered as locally as possible. The group also recommended that the helpline should subscribe to the Guidance Council's emerging quality standards, seeking accreditation when this became available, and that it should be staffed by helpers with a NVQ Level 3 qualification in guidance. These proposals were accepted by the Department, and an invitation to tender was published in spring 1997 alongside the prospectus for the local LIN services.

Following the General Election of May 1997, the new Labour Government instituted a policy review. The LINs were put on hold while the Department awaited the recommendations of the National Advisory Group for Continuing Education and Lifelong Learning. The helpline was however considered sufficiently pressing to proceed immediately. Because of the deferment of the LINs, there was no contracting body for local helplines which could be linked to the national network. It was accordingly decided to set up the helpline in a single callcentre, to be run by Broadcasting Support Services (BSS) and based in Manchester. This was launched in February 1998 as Learning Direct, having been preceded by the launch of the Scottish helpline in August 1997. The inauguration of Learning Direct coincided with the publication of a DfEE Green Paper which stated that the helpline was "for anyone over 18 years old" (DfEE, 1998a, p.22). The paper also announced the setting up of the University for Industry as a major new initiative designed to use new technology to improve learning and skills, and to "connect those who want to learn with ways of doing so" (p.18). It stated that "Learning Direct will become the UfI information and advice service when the UfI opens for business" (p.22).

In the consultation process that followed the Green Paper, some concern was expressed that the impartiality of the service offered by the helpline might be compromised by UfI's role as a learning provider. The issue of how far UfI was a *broker* of learning opportunities, or a *provider* of such opportunities, had been ambiguous from its outset (Hillman, 1996). It seemed likely, however, that the commercial pressures exerted by its need to become increasingly self-funding would lead in the direction of acting as a provider, in the sense of commissioning and endorsing particular learning packages and having its own registered students. The concern was that this might lead it to exert pressures on the learning line to promote these opportunities in preference to others. Nonetheless, the decision to locate responsibility for running the helpline within UfI went ahead, and in June 1999 the sub-contract held by BSS, along with the relevant database contracts, were novated by DfEE to UfI. Indeed, the relationship between UfI and the helpline was made perceptually more seamless by a decision not only to rebrand Learning Direct as Learndirect, but also to use the same brand name for UfI learning packages – there had been growing concern that "University for Industry" was a dangerous misnomer (see Robertson, 1998).

Current operation

Extent

Usage of the helpline has expanded rapidly. The initial target for its first year of operation was 50,000 calls; the actual total was 405,000 (Bysshe & Parsons, 1999). In 1999/2000 it took 639,000

calls; the target for 2000/01 was 1.2 million, with plans to expand to a capacity for handling 4 million (IDS, 2000). To cater for this expansion, the original 40 "seats" within the callcentre at Manchester had by the end of 2000 grown to 110 seats, with a further 110 seats at a second callcentre in Leicester. BSS is also responsible for the 8-seat Learndirect helpline service for Northern Ireland, based in Belfast, which opened in June 2000; in this case, however, the service is based in, and staffed by, the local Educational Guidance Service for Adults, benefiting from its information resources and staff experience. The services for Scotland and Wales are managed separately, with the Scottish service being based in Glasgow, and the Welsh service operating from four small helplines based in local careers services. This diversity reflects the growing diversification of guidance policy post-devolution (Watts, 1999a; 2001). All four national services are however marketed as Learndirect, use a single telephone number, and are subject to a four-countries agreement to offer minimum common standards of service.

Availability

The opening hours for the helpline are from 9.00am to 9.00pm Monday to Friday and from 9.00am to noon on Saturday. The rate of calls is volatile, and seems to be very sensitive to marketing campaigns, especially on television; there are also seasonal fluctuations, related for example to course start dates. Building and maintaining capacity to meet demand and to avoid caller frustration has not been easy. The rate of successful connection has however increased significantly since the inception of the service: from under 50% in the first year to around 94% in early 2000 (monitoring data). The risk of losing out-of-hours calls was noted in the evaluation by Bysshe & Parsons (1999, p.8); it is worth noting that in a national survey of 250 call centres, two-thirds operated seven days a week, and over one-third operated on a 24-hour basis over the seven days (IDS, 2000).

Staffing

The staffing structure of the service has been based on a distinction between Information Advisers who are qualified to NVQ Level 2 in Service Support, and Learning Advisers who are qualified to NVQ Level 3 in Guidance. There is a structured progression route for Information Advisers who wish to become Learning Advisers. The staff work in small mixed teams of 12. Between two-thirds and three-quarters of their time is spent on calls; time is also set aside for NVQ study or for investigations into new learning-opportunity developments (IDS, 2000, p.97). There is no "scripting" of calls: staff are viewed as the "jazz players" of the callcentre world (*ibid*, p.98).

A further layer of staffing was introduced in May 2000, linked to the introduction of a Learndirect website alongside the helpline. The website includes not only courses and occupations databases, but also a "Futures" diagnostic package which enables a self-assessment of skills, interests and values and connects the results to occupational families. Each page of the website includes a "call me" button which generates a telephone call from a Learndirect adviser. To deal with such calls, a new small team of Lifelong Learning Advisers has been set up, who are expected to hold, or be working towards, a Level 4 NVQ in Guidance.

This means that there are now three levels of advisers: Information Advisers dealing with straightforward "information" requests; Learning Advisers dealing with enquiries requiring "advice"; and Lifelong Learning Advisers dealing with enquiries requiring "advice and guidance" - a term selected to represent a midway position between "advice" and "guidance". The structure thus mirrors the distinctions between "information", "advice" and "guidance" which have been the basis of recent adult guidance policy (DfEE, 1998b). Implicitly, these levels could lead to a fourth level – full "guidance" – which the service does not claim to offer. The length of calls for the three roles varies: in January-March 2001 the average call duration was 4.0 minutes for the Information Advisers, 8.8 for the Learning Advisers, and 10.0 for the Lifelong Learning Advisers (monitoring data). Calls can be referred up the hierarchy: customer feedback surveys show that 25% of respondents had talked to more than one adviser in the process of resolving their enquiry (Wiseman & Parry, 2000, p.49) (though some of these may have been repeat callers whose original adviser was not available when they called again). It is anticipated that the expansion of the website will make it easier to answer straightforward information enquiries, and that this will mean that the helpline "will increasingly deal with a higher proportion of more complex calls from people requiring more detailed advice" (IDS, 2000, p.98).

Users

Part of the policy rationale for the service was the hope that it would reach non-traditional learners. The first-year evaluation by Bysshe & Parsons (1999) found that only 8% of callers had no or very low levels of qualification, compared with 36% qualified at first-degree level or above. Over half of users are aged 18-35; intriguingly, a further 4% are aged 17 or under – and therefore strictly outside the service's client group (Wiseman & Parry, 2000, p.16). In terms of gender, a majority (60%) of callers are women (*ibid*, p.13): this is a common finding among helplines – the figure for CareerPoint in New Zealand was identical (Adair *et al.*, 2000, p.9) – and may be due to higher levels of general help-seeking behaviour among girls and women (see e.g. Raviv *et al.*, 2000).

User ratings of the service have been high. Of the respondents in customer feedback surveys, 93% agreed that the overall quality of the service had been good, and 92% that they would recommend it to others. Satisfaction levels on a five-point scale for a variety of specified criteria ranged from 4.00 to 4.53 (Wiseman & Parry, 2000, pp.55, 58).

In terms of effects, a short-term follow-up survey found that the proportion of callers participating in full- or part-time education and training had more than doubled. Of the 9% of users who had moved from being unemployed or unwaged to paid work, nearly half attributed the change to the helpline to "a great" or at least "some" extent. In addition, 73% indicated that it had raised their awareness of relevant education/training opportunities, 57% that it had contributed to their career planning, and 40% that it had improved their self-confidence (Bysshe & Parsons, 2000, pp.52-55).

Issues

In-depth guidance

The Learndirect service has clearly demonstrated the potential of the telephone for delivering career information and guidance. Since its inception in February 1998 and the end of 2000, it had received and responded to 2.4 million calls. This is a very high level of penetration for a single service. It also represented the first "entitlement" provision in the field of adult information and guidance since the demise of the Occupational Guidance Unit in 1978: other programmes have been short-term initiatives or targeted at specific groups. Even at their peak, however, the Occupational Guidance Units were only seeing around 54,000 clients a year (MSC, 1978).

Admittedly, Learndirect does not claim, and indeed has firmly resisted claiming, to offer in-depth "guidance". With the appointment of Lifelong Learning Advisers, though, it has moved a significant step further in this direction. Professional reservations about the feasibility of offering in-depth guidance over the telephone are refuted by the examples cited earlier of successful practice elsewhere.

The real reason for the current restriction of Learndirect in relation to in-depth guidance is not its feasibility but the relatively low priority attached to it in policy terms. The two-level model which has been the basis of Government policy on adult guidance since the mid-1990s has been based on public funding for information, brief advice and signposting as a service which is free and accessible to all, with in-depth guidance available free to specified groups, especially the unemployed, but not "universally supported out of public funds" for the majority of adults in employment (DfEE, 1998b, p.4). This policy is based on the perceived need to control public

expenditure. The unit costs of in-depth guidance are relatively high because it is so labourintensive.

Moreover, the policy can be supported by a rationale based on public economics theory (Bartlett *et al.*, 2000, pp.145-146; cf. Savas, 1987). This suggests that guidance services should be provided free of charge by the state only in the case of market failure. Information services are widely recognised to lead to market failures because the provision of information is not excludable: in other words, individuals would not be willing to pay for the collection and provision of information that would subsequently be available to other individuals free of charge. Accordingly, individuals left to their own devices would not be willing to pay for the socially optimal level of impartial information and advice. Firms could therefore find it unprofitable to supply such information on the market, leading to market failure in its provision: information provided by the market would be provider-driven rather than impartial. In contrast, it is argued that in-depth guidance services *are* excludable, since they are specific to the individual, and that there is therefore in principle no reason to anticipate market failure in this area. In short, insofar as there is a public, as well as a private, interest in individuals having access to in-depth guidance alongside information and advice (Watts, 1996), it should be possible to meet this interest at least in part through fee-charged services to individuals.

From this perspective, the restrictions on in-depth guidance in the Learndirect service are based on public-funding restrictions and the difficulties of introducing fee-charging within a telephone service of this kind. Almost all helplines and call centre services are free to the user or are part of a wider membership subscription package: customers are not accustomed to paying directly for such services. If to this is added the wider difficulties experienced in developing a market in guidance based on fee-charging (Watts, 1999b), it explains why Learndirect has not moved further down this road. Significantly, the web-based "Futures" package to which the role of Lifelong Learning Advisers is linked *is* fee-charged: it is encrypted, and access to it is offered by Learndirect as a costed programme. Take-up to date has been limited, so conclusions about its role in a broader guidance offer are probably premature. Helpline advisers have been making it available free of charge on a trial basis, and it can also be used free of charge within UfI learning centres. In addition, DfEE have made it available free for a six-month period to members of Information, Advice and Guidance for Adults (IAGA) Partnerships to explore whether such an arrangement should be made permanent, in the interests of equity of access. In the light of all this, it seems likely that the rationale for establishing "Futures" as a costed learning programme may be

open to review, along perhaps with the future development of in-depth guidance within the Learndirect service.

Integration

The wider relationship of Learndirect to IAGA Partnerships also seems worthy of review. As noted earlier, the original plans for the "learning line" envisaged it being linked closely to Local Information Network (LINs). These plans were dropped and the helpline was implemented on a stand-alone contractual basis, largely because of the delays in setting up the LINs. Now the IAGA Partnerships have belatedly been set up, effectively replacing the LINs, with the emphasis shifted from collection and dissemination of information to delivery of information, advice and guidance services. The DfEE specification for the partnerships proscribed the use of DfEE funding for local helplines or information collection because this would duplicate the responsibility of Learndirect. It stated, however, that the partnerships and the Learndirect helpline "must agree a protocol to ensure that effective client referral systems exist between them" (DfEE, 2000, para.18).

The protocol agreed at national level during 2000 stated that Learndirect advisers would refer callers "who have more in depth local IAG needs"¹ to the appropriate local partnership. Each partnership would determine whether it wished referrals to be routed directly to the most appropriate local IAGA service provider to book an appointment, or whether it wanted them to go via a local co-ordinator who would route them appropriately at local level. The process is however rather cumbersome, and it seems likely that some referrals get lost simply because of delays and communication problems.

This issue is as an important one, because Learndirect has the potential to become not only a strong delivery vehicle in its own right but also a powerful diagnostic portal into wider career information and guidance services. The first-year evaluation found that only 7-8% of callers had been referred to a local careers or guidance service. It noted that, while it is clear that in-depth guidance "is not an essential prerequisite of effective choice for all adults … concerns rightly exist about ensuring that, at the least, appropriate individuals are aware of the availability of guidance to enable them to more thoroughly explore their ideas and, at best, that individuals' guidance needs are effectively diagnosed" (Bysshe & Parsons, 1999, pp.56, 73-74). The diagnostic role of Learndirect could in principle be similar in some respects to the triage role of NHS Direct within the National Health Service. But to implement this would require a more comprehensive guidance infrastructure than exists at present, smoother communication channels within this infrastructure (e.g. booking callers direct into face-to-face interviews or group sessions), and clearer referral

rules supported by stronger diagnostic tools. For the present, Information Advisers and Learning Advisers working with someone who seems to require more in-depth guidance have discretion to refer them in any of three directions: to a Lifelong Learning Adviser, to the "Futures" programme, or to their local IAGA Partnership.

The reality is that currently the Learndirect helpline is not housed exclusively or even predominantly within a policy frame focused on the delivery of career information and guidance. In policy terms, it is also linked to at least two other major concerns: extending take-up of learning, and extending take-up of UfI learning packages. None of the three are mutually exclusive, and it may at times be politically useful to link them together: indeed, it could be argued that it is precisely their conflation that has secured the public funding for the helpline. But operationally they weight the service in different directions. If, for example, access to learning is prioritised, this would tend to encourage maximising "direct-route" entry to learning programmes: from this perspective, *low* levels of referrals to in-depth guidance services might be regarded as an appropriate performance measure. If, on the other hand, greater priority is attached to encouraging individuals to review their career interests, talents and career direction in some depth before committing themselves to a particular programme, then the appropriate performance measure would be *high* levels of such referrals.

Impartiality

The issue of the promotion of UfI learning packages adds a further complication. As noted earlier, concern was expressed during the consultations that preceded the setting-up of the helpline about the risk that this would compromise the impartiality of the service. From UfI's perspective as a learning provider, the issue is whether it believes that providing an impartial service will in the end result in enrolments from *more* learners and *more motivated* learners than a more narrowly-based marketing strategy. This is not a unique dilemma: it is faced by all learning providers. The UfI faces the issue in a particularly stark and visible way.

In practice, the accreditation to the Guidance Council quality standards by the Guidance Accreditation Board (GAB) provides external endorsement of the impartiality of the information and advice that is offered. The culture of the Learndirect callcentres is strongly learner-centred; the level of take-up of Learndirect courses by callers is recorded in monitoring reports – in 1999/2000 it represented 4% of callers (Wiseman & Parry, 2000, p.61) – but is not used as a performance measure. It is also worth noting that the ease with which the service can be accessed makes it very transparent. "Mystery callers" are not confined to formal evaluations (or, indeed, to

GAB accreditation processes, which include "mystery shoppers"): learning providers concerned that they are receiving due mention can test the service to see whether this is the case – and not infrequently do so. Since the helpline is a separate DfEE contract based on the principle of impartiality, any serious evidence that this is being infringed could imperil the contract.

Nonetheless, the use of the name Learndirect to brand both the impartial helpline service and the UfI's own learning provision may confuse the perceived impartiality of the service in the eyes of some potential and actual callers. Moreover, the principal marketing campaigns – based, in particular, around a "Walks of Life" television advertisement – have tended to blur the distinctions between guidance, learning, and UfI learning provision. It also seems possible that confusion about impartiality has limited the number of "trails" which the BBC has provided from its mainstream programmes. Concerns have been expressed by BBC staff that such trails may be seen as favouring one learning provider over others.

Framing

National v. local. The current structure of the Learndirect service determines the way in which it is framed in at least three key respects. The first is the extent to which the service is offered at national or at local level. NHS Direct, for example, is a national service, operated locally: calls are routed to the local call centre, though they are passed elsewhere when lines are busy. Part of the rationale for this is the notion that, in time, it might become the "gateway" to all local health services (McLennan, 1999). As noted earlier, a similar approach was initially advocated in the case of the "learning line", and the model adopted in Wales moves some way in this direction. Elsewhere in the UK, however, the notion is that the helpline should operate at a national level, and that local information should be offered on a face-to-face basis. This can result in some loss of quality: one of the areas of concern identified in the first-year "mystery caller" evaluation was "lack of local knowledge, including broad understanding of geography and detailed understanding of local learning and guidance provision, networks and referral agencies, and transport" (Bysshe & Parsons, 1999, p.18). Against this needs to be set the consistency of service and adviser training offered by relatively large-scale operation.

Adults v. all-age. The second is the extent to which the service is confined to adults or might be extended to young people too. The Learndirect service was formally designated as being for adults (aged over 18), though it has attracted some younger users. There is currently much discussion about developing a Connexions Direct service as part of the new Connexions Service for young people. A pilot is due to start in the North-East in autumn 2001. Connexions Direct is

designed to "use call centre and web technology to help Connexions reach out effectively to all young people", and "will be an integral part of local Connexions provision, offering a complementary tier of service delivery" (Connexions website, www.connexions.gov.uk, April 2001). A key issue here, again, is whether the helpline will be national or local: "some information and advice can be offered effectively through websites and helplines at national level, but some will have more credibility if it is grounded in local knowledge" (Offer & Watts, 2000). In addition, it could be totally separate from Learndirect, or integrated with it. The CareerPoint helpline service in New Zealand is deliberately all-age, and indeed 26% of callers in its pilot were aged under 20 (Adair *et al.*, 2000, p.41). In the UK, decisions on this may well be linked to wider policies on guidance provision: in Scotland and Wales, the current policy is to encourage "vertical" integration of careers services for young people (personal and social as well as related to learning and work) (Watts, 1999a; 2001).

Learning v. career. This leads to the third framing issue: the extent to which the service focuses on "learning" or on "career" (in either a broad or narrow sense). The focus of Learndirect has been on "learning". The first-year evaluation report found that the emphasis of the information was clearly vocational; it also found that the service was better at dealing with learning enquiries than with enquiries about careers and other opportunities (Bysshe & Parsons, 1999, pp.38, 73). Later customer feedback surveys indicated that expectations of the service tended to be focused around "courses", and that levels of satisfaction were higher in this area than in more job-related areas (Wiseman & Parry, 2000, pp.28, 33). A new Employment Service Direct helpline was launched in January 1999 to pick up job-related enquiries: calls are connected to one of over 100 Employment Service teams set up across the country to deliver the service. This reflects the operational separation of the Employment Service from the Department for Education and Employment. In New Zealand, on the other hand, the CareerPoint service is focused on "career" and brings together both "learning" and "work": a customer satisfaction survey of its pilot found that 73% of users contacted the service "to find out what to steps to take to pursue a particular career", 65% "to find out what training courses are offered", 38% to "look to changes of jobs or careers", and 36% "to find out about how to choose a career" (BRC Marketing and Social Research, 2001). A new helpline for young people launched in March 2001 by Careers Management Ltd. in advance of Connexions Direct has similarly adopted the title "Careerline"; it seems likely however that Connexions Direct itself will be much more broadly based, covering

personal and social as well as educational and vocational issues. The "labelling" of a service, and the way in which it is promoted, strongly determine the kinds of calls it receives.

Technological synergy

The Learndirect helpline and website are managed separately: the former by BSS; the latter by Citizen Connect. This has restricted the extent to which the two services have been planned in an integrated way, though the BSS contract includes providing support for the "Futures" programme within the website. There are opportunities for increased synergy. For example, a user of the CV section of "Futures" could ring a telephone adviser, who could then bring up on their screen the caller's work to date and talk it through with them. Conversely, more telephone callers could be encouraged to use the website and be supported in doing so: at present only 7% of respondents in customer feedback surveys indicate that they have even visited the site (Wiseman & Parry, 2000, p.57).

A related issue is the use of e-mail. This is at present limited to users of the "Futures" programme who are invited to use e-mail at particular points, notably the CV-building section. The rule is that the client selects the medium: if they enquire via by e-mail, they are responded to via e-mail. The potential for extending use of e-mail is considerable. Currently, printed provision is sent to around one-third of callers by postal mail (Wiseman & Parry, 2000, p.9). As domestic usage of e-mail grows, it should be easy after calls to send off this information routinely and immediately as attachments, so reducing the dangers of oral miscommunication and formalising the information for ongoing reference. Greater use of e-mail might also make it possible to sustain contact with a particular adviser over a period of time through a mixture of synchronous (telephone) and asynchronous (e-mail) communications. At present, 15% of users are repeat callers (*ibid*, p.3).

The current limited synergy between telephone and web-based services reflects what is happening in callcentres more generally. A survey by IDS (2000) found that only a small proportion of callcentres could be regarded as fully "web-integrated", although a large number were planning to move in this direction. Callcentres are now predicted to evolve into multi-media "contact centres", capable of dealing not only with telephone calls, but also with contacts via e-mail, the Web and interactive digital television.

The concept of iterative contact with Learndirect through flexible usage of the telephone, website and e-mail, linked selectively with local face-to-face facilities, opens up new opportunities for the delivery of career information and guidance. It means that individuals can access help in the form in which they feel comfortable. Some feel comfortable visiting a careers centre; some do not.

Some are more comfortable on the telephone, or on e-mail; some are not. Clearer models, based on users' experiences, regarding the strengths and weaknesses of the different media, and ways in which they can be effectively combined, could provide a stronger basis for planning coherent service delivery.

A further dimension could be added to this by the likely move towards ready domestic access to videophones (Kraut & Fish, 1997) or interactive television. Already, desk-top videoconferencing is growing, and experiments have taken place in its use for guidance as well as selection interviewing (Oborne *et al.*, 2001). An evaluation of an experiment involving audioconferencing (in which adviser and students could talk to one another and share career guidance software) and videoconferencing (where they could also see one another) found that although videoconferencing was felt to be useful for establishing rapport in the early stages of an interview, it was not felt to be significantly more successful than audioconferencing during the part of the interview where the focus was on "application sharing" (discussion of an interest profile and job suggestions, represented in the shared software): indeed, it was felt that it could even be a distraction here. Both, however, were considered more satisfactory than the use of the telephone on its own (Closs & Miller, 1997). This was a limited experiment, and the evidence should not be regarded as being in any way definitive. But the addition of video links and/or synchronised access to web-based resources seem likely to add significantly to the potential of the telephone.

Professional development of guidance staff

A final issue to be addressed is implications for the training and career progression paths of career guidance staff. We have noted that the present Learndirect structure of Information Advisers, Learning Advisers and Lifelong Learning Advisers offers both differentiation of skill levels and a potential route for career progression. Added to the lack of "scripting" of calls, this has enabled Learndirect to avoid some of the problems, experienced by many callcentres, of low staff morale and high turnover (Huws & Denbigh, 1999; IDS, 2000; TUC, 2001). Level of staff retention are reported to be much higher than in most callcentres.

An interesting issue is whether telephone guidance should be viewed as a distinctive specialism within the guidance field or as one among many areas of application for generic staff. This is linked to the question of whether or not it is helpful for advisers to have ongoing experience of face-to-face guidance work alongside their telephone work. Some Learndirect staff combine a couple of evening shifts with a traditional careers adviser job in the daytime (IDS, 2000, p.96); in Belfast, some of the helpline staff do face-to-face work within the Educational Guidance Service

for adults where the helpline is based. Further research is needed to assess how far such face-toface involvement improves the quality of their work on the helpline. The same issue arises in, for example, the case of NHS Direct, where current policy on staff rotation varies between local sites: some favour whole-time appointments; others favour split posts and rotational schemes with primary or secondary care services in order to maintain clinical competencies (McLennan, 1999). In the guidance field, it is possible that staying too long on exclusively telephone work might result in some atrophy of generic guidance skills – for example, interpreting visual signals, and building rapport.

A related issue is whether some experience of face-to-face work should be required in the training of helpline advisers. Until recently such experience was required in order to gain evidence for the NVQ Level 3 (this is no longer the case). There is anecdotal evidence that some of the Learndirect advisers found this daunting: they felt exposed by not being able to refer invisibly to the database, and felt safer and more in control in the callcentre environment. This could, however, be regarded as strengthening the case for such experience. Conversely, it has been argued in the case of counselling that the lack of visual evidence in the audio mode prevents counsellors from making judgements based on appearance and refines their listening skills, suggesting that the use of audio counselling in generic training programmes would be beneficial (Day & Schneider, 2000). The same case could be made in relation to guidance.

A final question regarding professional development is whether it is essential for advisers to work in the callcentre or whether they could work effectively from home. A survey of callcentres by Huws & Denbigh (1999) found that although only 4% were currently employing home workers, a further 42% expected to do so in the future (p.41). Some Learndirect advisers are interested in becoming home-based teleworkers, for personal reasons. If such an option is offered, should it be offered only to people who have already worked in the callcentre, or to new recruits as well? Could Learndirect in due course become a virtual callcentre?

Conclusion

The development of the Learndirect helpline service has demonstrated the potential of the telephone for delivering personalised career information and advice on a massive scale. Telephone guidance sits somewhere between face-to-face guidance and web-based guidance: it combines the synchronous interactivity of face-to-face work with the "at a distance" accessibility of web-based work. Its potential has been underutilised in many countries to date. The example of Learndirect shows what can be achieved, and some of the issues that need to be addressed.

The case-study of Learndirect also indicates the extent to which public-policy issues shape decision-making in relation to guidance services in general, but particularly so in relation to major initiatives in technically mediated service delivery (cf. Watts, 1993). The level of public investment required is so substantial, and the decisions required have to be so clear-cut, that the underlying economic and political issues are more manifest than they often are in relation to direct human services. The constraints imposed by the contractual structure of the Learndirect helpline has constrained its capacity for total service redesign – in comparison, for example, with NHS Direct or, indeed, the New Zealand CareerPoint service. On the other hand, the links with a high-profile Government initiative like the University for Industry have arguably made it possible to command much more substantial resources than would otherwise have been the case. It is this that has made it possible to demonstrate – more clearly than hitherto – the potential of helplines in the career guidance field.

Note

(1) The conflation of "in depth local" in this document is intriguing. There are two reasons for referrals to a local service: for access to local information; or for access to a more in-depth guidance service than Learndirect is able to provide. The two reasons seem likely to be almost totally separate from one another.

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