

Department for Work and Pensions

Research Report No 505

Review of the Interventions Delivery Target

Ann Purvis and James Lowrey

A report of research carried out by Northumbria University on behalf of the
Department for Work and Pensions

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Summary

Jobcentre Plus introduced the Interventions Delivery Target (IDT) in April 2007. The target was designed to ensure that lone parent, Incapacity Benefit (IB) and Jobseeker's Allowance (JSA) customers are provided with timely work-focused support at key stages of their benefit claim.

The IDT aims to ensure that 85 per cent of specific interventions take place within stated timescales and it is measured across four elements of interventions delivery, with each element forming an equal share of the overall score. These four elements are:

- 80 per cent of initial IB Work Focused Interviews (WFI) are conducted after the end of the eighth week of the claim and up to the end of the 13th week.
- 85 per cent of Income Support (IS) lone parent WFI reviews are conducted within three months of the due date.
- 85 per cent of cases checked for 13 and 26 week JSA advisory interviews are conducted within six weeks of the due date.
- JSA Labour Market Interventions (LMIs) and follow-up activity for the case of non-availability or refusal to work are conducted in 90 per cent of cases checked.

Overall, the study aimed to review the early implementation of the IDT, identifying any 'bedding in' issues, and then go on to review steady state running of the target. The research focused on providing an overview of how the mechanics of the IDT were working and how Jobcentre Plus staff managed performance. To achieve this, the review was conducted in two distinct but interrelated stages: Stage One, a post-implementation review carried out during June and July 2007 and Stage Two, a stock-take review during November and December 2007. A qualitative approach was utilised, focusing on the views and perceptions of individual staff gathered via a series of in-depth interviews.

Review findings

Staff awareness and understanding of the IDT

The initial element of the staff interviews aimed to assess whether staff had an understanding of the target and how they, as individuals, contributed towards it. During Stage One staff awareness of the structure and purpose of the IDT was variable, with Diary Admin Support Officers (DASOs), Advisers and managerial staff generally demonstrating a good level of knowledge. The staff in Benefit Delivery Centres (BDCs) and Contact Centres (Benefit Processors and First Contact Officers (FCOs)) often had a much more limited understanding. Although this general pattern was broadly similar during Stage Two, there were improvements in awareness within both Jobcentres and Contact Centres.

When staff were asked how and when they received information about the IDT, a number of issues were raised regarding the communications process related to the implementation of the new target. In general there was a sense that the information and guidance which staff required for successful early implementation was not always readily available or produced in the most appropriate format.

There was also evidence of a considerable degree of performance improvement activity shortly after the implementation of the IDT. This, along with the staff views on the shortcomings in the communications process, suggest that an increased investment in launch activities would have been useful. In the longer term such an approach may prove to be more cost effective than reactive performance improvement activity shortly after implementation. It is therefore recommended that the following general issues be considered prior to the introduction of new organisational targets:

- the need for the timely delivery of clear and comprehensive guidance;
- the need for information tailored to the specific needs of staff groups;
- the need to use appropriate and effective delivery methods.

Working with the Interventions Delivery Target

Jobcentres

In working with the IDT, Jobcentre staff identified a range of issues which have an impact upon their ability to meet the target requirements. Customers failing to attend interviews and the availability of Advisers to carry out interviews, were seen as the main potential constraints on performance. To address these issues a number of processes had been adopted within Jobcentres, for example to minimise failures to attend, the use of pre-calls was seen to be effective, although there were concerns about the levels of resource this involved. This concern was linked to a general reservation articulated by a number of senior staff, particularly during Stage Two, that IDT processes were taking precedence over outcomes.

The need for close management of Advisers' diaries was a key lesson learned as Jobcentre staff became familiar with the IDT and during the course of the study Jobcentres also appeared to be moving towards a flexible or multi-functional approach for key staff such as DASOs and Advisers. These staff no longer specialised in working with JSA, lone parent or IB customers and instead worked across all customer groups, although there were some concerns that this approach could dilute specialist skills and knowledge.

Contact Centres and BDCs

A number of operational issues were identified which have an impact upon Contact Centre and BDC performance, in particular with relation to the IB element of the IDT. These issues were often related to shortcomings in the IT systems used by staff, which many regarded as unsupportive of current operational practice. Difficulties were exacerbated by low levels of staff awareness of the operational requirements associated with the introduction of the IDT and a general perception that the IDT was a 'Jobcentre target'.

Within Contact Centres the deficiencies of the IT systems being used greatly complicated the role of the FCO and it is perhaps unsurprising that errors occurred in areas such as setting Jobcentre Plus markers. Given the complexity of the systems used by FCOs, the omission of basic level IT skills as an essential requirement when recruiting staff to this role should perhaps be reviewed.

The IT system used to process IB claims within BDCs also appears to have significant limitations, in particular with regard to the links to other Jobcentre Plus customer management systems. Staff suggest that delays in the processing of claims are, however, largely related to gathering relevant supporting information from customers. Some review of how the FCO informs customers of what is required to support claims and the checks carried out by financial assessors prior to the submission of claims to the BDC, may therefore, be helpful.

Overall, despite the issues described above, it is clear that once operational requirements related to the IDT were apparent to staff, performance improvement activities were undertaken to address specific difficulties. Within Contact Centres and BDCs it would appear that these operational requirements were not identified until some time after the implementation of the target. When introducing new targets it might be helpful for each operational area to identify potential performance constraints and contribute to the development of appropriate staff guidance prior to implementation.

It is recommended that some of the specific difficulties highlighted by staff may require further review, in particular with regard to ensuring:

- IT systems support current operational practice;
- the recruitment of FCOs with appropriate IT skills;
- the information required to support IB claims is clearly communicated and the role carried out by the financial assessors confirmed.

Staff perceptions of the Interventions Delivery Target

The IDT and customer service

There was a strong view amongst many staff that the IDT supported good customer service, by ensuring that customers are offered the advice and support which will assist them to find work. This view was the basis of the positive staff perceptions of the IDT which were found across both stages of the study. In addition to this, many staff also identified the target focus on IB and lone parent customers as an important development.

When staff discussed how interventions help people into work, some also described the importance of employment as a way of helping disadvantaged people out of poverty. Many staff clearly valued the role that Jobcentre Plus plays in helping disadvantaged people to improve their situation via work and were committed to their part in that role.

It should, however, be noted that some emerging working practices associated with the drive to meet IDT performance levels could potentially have a detrimental effect on customer service. For example, there did appear to be a growing reluctance amongst staff to use the option to waive or defer customer interviews and staff raised concerns about service quality related to an increasing use of multi-functional Advisers. In order to assess the impact of these issues it may be helpful to review any evidence of:

- changes in the use of interview waivers and deferrals;
- the impact of multi-functional staff on the quality of service offered to lone parent and IB customers.

The IDT and the Job Outcome Target

Staff, and in particular managers, were more ambivalent towards the new target in relation to the links between the IDT and another Jobcentre Plus Target, Job Outcome Target (JOT). There was a general view that as the IDT helps to ensure that customers attend WFIs, this must have a positive impact upon job outcomes. However, staff were not able to offer evidence of a positive correlation between performance against the two targets, indeed a number of areas with good IDT performance indicated that they performed poorly against JOT. Staff offered a number of explanations for this, most commonly raising questions about the configuration of JOT, rather than about the value of the interventions monitored by the IDT.

There was a suggestion that JOT performance targets were unrealistic, and that not all relevant job outcomes are recorded. Some staff suggested that when customers from the lone parent and IB groups move into employment they are often employed part-time and so this may not be recorded as a job outcome. Staff also suggested that because of the long-term nature of the work, many lone parent and IB customer interventions undertaken since the introduction of the IDT would not yet be reflected in job outcomes.

With the delays inherent in the production of JOT data, it will be some time before the impact of the IDT upon JOT is clear. This lack of clear evidence of any positive impact of the IDT in terms of job outcomes was an increasing concern with a number of managers, most notably during Stage Two of the study. It is recommended that the relationship between IDT performance and job outcomes should be monitored over time to provide the evidence required to accurately assess the impact of the new target on JOT performance.

The IDT – ‘process over outcome’ and ‘quantity versus quality’

As staff within Jobcentres developed their working practices to support IDT performance, a number of senior staff began to articulate a general concern that ‘process’ was taking precedence over ‘outcome’. They noted that significant resources were being allocated to support IDT performance without clear evidence this that would be reflected in improved job outcomes.

In addition to this a number of staff also expressed some reservations about the potentially negative impact a process related target can have upon quality. Whilst they acknowledged that the IDT was not intended as a measure of quality, there were suggestions that the quality of interventions might suffer as more attention and resource was diverted towards managing the IDT processes. Whilst this was commonly raised during Stage One of the study no direct evidence of any negative impact was found. There was, however, some evidence of customer interviews in one district being shortened during Stage Two and it will be important for Jobcentre Plus to monitor and address any similar action which may compromise the effectiveness of interventions.

1 Introduction

1.1 Background

Jobcentre Plus introduced the IDT in April 2007. It replaced the Business Delivery Target (BDT) and was designed to ensure that lone parent, IB and JSA customers are provided with timely work-focused support at key stages of their benefit claim.

The target aims to ensure that 85 per cent of specific interventions by Jobcentre Plus take place within stated timescales and is measured across four elements of interventions delivery:

- 80 per cent of initial IB WFIs are conducted after the end of the eighth week of the claim and up to the end of the 13th week (days 57-91 of the claim).
- 85 per cent of IS lone parent WFI reviews are conducted within three months of the due date.
- 85 per cent of cases checked for 13 and 26 week JSA advisory interviews are conducted within six weeks of the due date.
- JSA LMI and follow-up activity for the case of non-availability or refusal to work are conducted in 90 per cent of cases checked.

Each of these four elements forms an equal share of the overall IDT score.

The elements of the IDT that relate to the delivery of interviews are based on former Key Management Indicators (KMIs) that supported the JOT, and the LMI element formed part of the BDT for 2006/07. However, the measure was changed from 'interviews booked' to 'interviews conducted' for all of the interventions included within the target.

1.2 Structure of the report

The review of the IDT was carried out in two distinct but interrelated stages, Stage One carried out three months post-implementation and Stage Two a stock-take carried out five to six months later. The report will highlight the key themes

identified by the review and present finding from Stage One and Stage Two under each of these thematic headings, highlighting any similarities or differences arising at each stage of the study.

Chapters 3 and 4 of the report cover the broad themes of staff awareness and their attitudes to, and views about, the IDT, with Chapters 5 and 6 covering the operational impact of working with the target. Chapter 5 looks at working with the IDT in Contact Centres and BDCs, with Chapter 6 focusing on Jobcentres. Brief conclusions are offered at the end of each chapter and these are brought together and reviewed in the final chapter.

2 Methodology

2.1 Aims of the review

Overall, the study aimed to review the early implementation of the IDT, identifying any 'bedding in' issues and then go on to review steady state running of the target. The research focused on providing an overview of how the mechanics of IDT were working and how Jobcentre Plus staff managed performance. To achieve this the review was conducted in two distinct but interrelated stages: Stage One, a post-implementation review carried out three months after the target was introduced (June – July 2007) and Stage Two, a stock-take review five to six months after this (November – December 2007).

2.1.1 Stage One: IDT post-implementation review

This stage primarily reviewed the implementation of the target, broadly examining issues related to:

- levels of staff understanding and behaviours, including:
 - attitudes towards, and views about, the target;
 - actual and potential changes in behaviours to achieve IDT performance;
- the structure and working mechanics of the target;
- early teething problems and bottlenecks.

It aimed to gauge the success of IDT implementation, identifying any areas of good practice and emerging issues that could potentially hinder the achievement of the target. It also aimed to determine what, if any, immediate and longer-term changes were needed to ensure effective in-year and longer-term performance.

2.1.2 Stage Two: IDT stock-take review

Stage Two was a follow-up study looking at broadly similar areas to Stage One, with a particular focus on the operation and management of IDT during 'steady state' conditions. This stage aimed to review how Jobcentre Plus staff were working with the target nine months after its implementation and to assess how

the organisation was managing IDT performance. Findings from this stage were compared with those from Stage One to identify any changes that had taken place as working practice related to the target has become established.

2.2 Fieldwork

As the study aimed to provide an overview of staff attitudes and behaviours related to IDT, the mechanics of how the target was working and how performance against the target was being managed, a qualitative approach was adopted. The study, therefore, focused on the views and perceptions of individual staff which were gathered via a series of in-depth semi-structured interviews.

Initial discussions were held with members of the relevant Jobcentre Plus Head Office Policy Teams (JSA, lone parents and IB) and these discussions, along with the research questions in the project specification, informed the development of the topic guides used in the staff interviews. Copies of these topic guides can be found within Appendix A.

2.2.1 Selection of sites

Fieldwork for both Stages One and Two of the study covered ten Jobcentre Plus offices in five districts, along with two Contact Centres, and two BDCs linked to these districts. The offices were pre-selected by the Jobcentre Plus Research Project Manager based on their performance against the JOT KMIs in the 2006/07 performance year and penetration rates (job outcomes as a proportion of client base) for the 2005/06 performance year. For example, a district may have been selected because it has a high KMI score but a low penetration rate, or because it has a low KMI score but still achieved good penetration rates. Performance was judged against lone parent, IB and JSA KMIs.

Interviews with Jobcentre office staff were carried out in two offices per district, one small and one large office based on the JSA register, the two Contact Centres and two BDCs.

One of the two selected Contact Centres for each stage of the research was linked to a district with high KMI performance as described above and one with a low KMI score. Similarly the two BDCs were linked to high and low scoring districts.

Stage Two fieldwork included one district which was involved in Stage One of the study, and four new districts. Different Contact Centres and BDCs were involved in Stages One and Two.

2.2.2 Staff interviewed as part of the study

Around 100 Jobcentre Plus staff from the following groups were interviewed at each stage of the study:

- Contact Centres:
 - FCOs;
 - Team Leaders;
 - Business Development/Performance Managers;
 - Contact Centre Managers;
- BDCs:
 - IB Processors;
 - Team Leaders;
 - IB Managers;
 - BDC Managers;
- Customer Service Directorate (CSD):
 - Fortnightly Jobsearch Reviewers (FJR);
 - Advisers delivering the intervention regime;
 - Advisory Service Managers (ASMs);
 - DASOs;
 - Customer Engagement Team Leaders (CETLs);
 - Customer Services Operation Managers (CSOMs);
 - Jobcentre Managers;
 - District Managers;
 - District Performance Managers;
 - Regional Performance Managers;
 - Regional Customer Service Director;
- Jobcentre Plus Head Office:
 - Performance Measurement and Analysis Division;
 - Operational Performance Support;
- DWP – Welfare Work and Equality Group:
 - Delivery Strategy and Performance.

Full details of the numbers of staff interviewed are given in Appendix B.

Interviews were conducted on a face-to-face basis where possible, with a small number carried out by telephone where this was necessitated by operational constraints and the availability of the respondent. Permission to record interviews was sought and in the majority of cases obtained. A small number of respondents (n=2) preferred not to have the discussion recorded and in these cases notes were taken via tabular interview schedules.

The recorded interviews were transcribed verbatim and reviewed, along with interview notes, to identify key themes. A coding framework linked to the key themes identified and incorporating areas of interest highlighted within the research specification was then devised and the interview transcriptions coded accordingly. Tables were constructed for each staff group and location, which identified the key themes, with rows for the insertion of a summary of the coded data from the individual interviews. A final stage of analysis was also carried out which aimed to highlight patterns within and across staff groups and locations.

3 Staff awareness and understanding of the Interventions Delivery Target

Staff interviews for both Stages One and Two of the study commenced with some general questions to gauge awareness of both the structure and purpose of the IDT. In order to assess the provision of information and guidance to staff, which supported the introduction of the new target, Stage One asked how and when they had heard about it. Issues related to the format and suitability of the information were also explored. This was followed up in Stage Two with questions about any further information or guidance staff had received since the target was introduced.

3.1 Levels of staff awareness

During Stage One, staff awareness of the structure and purpose of the IDT was variable across staff groups; with DASOs, Advisers and managerial staff generally demonstrating a good level of awareness. FJRs, Benefit Processors and FCOs appeared to have a much more limited understanding and, in particular, the majority of Contact Centre and BDC staff showed little or no recognition of the term IDT.

However, where there was little or no recognition of the terminology, further discussions showed that staff were generally aware of the requirement to carry out interviews with customers and their role in that process. For example, a number of the staff who processed new claims for IB understood that delays in benefit processing would lead to a delay in customers being seen by an adviser in the Jobcentre. They were also aware that there are targets for the timescales involved in carrying out these customer interviews. Staff also articulated why it

was important to see customers in a timely way, linking this process to helping people back to work, and some talked about the importance of work as a route out of poverty.

The pattern of staff awareness was broadly similar during Stage Two, although generally there were improvements in the levels of awareness within both Jobcentres and Contact Centres. Again, this was not manifested as recognition of the term IDT or specific knowledge of the target structure. Rather it was an improved understanding of the role that staff play in the process of scheduling customer interviews, the need to ensure that they complete tasks correctly and the impact of failing to do so.

'I would say in all honesty the delivery centre and the local office, they are relying on us to make sure we do it right, if we don't do it right to start with it is going to cause no end of problems further down the line.'

(FCO, Stage Two)

3.2 Implementation of the Interventions Delivery Target

3.2.1 Interventions delivery – KMI to target

As highlighted in Section 1.1, the elements that make up the IDT are not entirely new measures of Jobcentre Plus performance. Those that relate to the delivery of interviews are based on former KMIs in place to support the achievement of JOT, and the LMI element formed part of the BDT for 2006/07, although the change in the measure from 'interviews booked' to 'interviews conducted' was significant. However, CSD managers interviewed in Stage One were very positive about the benefits of having the opportunity to work with the IDT elements of the previous years' KMI prior to them being introduced as part of a higher level target.

3.2.2 Informing staff about IDT

The most commonly articulated concerns about the implementation of IDT were related to the communications process, with a number of issues highlighted across the range of staff groups and Jobcentre Plus directorates in both stages of the study. These issues broadly related to four general areas which were: the need for clear and comprehensive guidance to support implementation, the need for some specific targeted information, i.e. tailored to the specific needs of particular staff groups, the timing of the process and the delivery methods used.

Whilst the provision of information and guidance was an important issue for Contact Centre and BDC staff in both stages, it appeared to be a less significant concern for CSD staff by Stage Two. However, when staff were asked about any further information or guidance they had received since the target was introduced, none reported any additional communications, other than locally based initiatives devised to address specific performance issues. For example, FCOs in one of the Contact Centres described how they had reviewed guidance and developed a tailored presentation for their teams.

For CSD staff in Stage Two there was an implication that staff had become more aware of the target simply by the process of working with it on a day-to-day basis, in particular via work-related to IDT performance improvement activities, rather than any specific additional communications.

3.2.3 IDT implementation guidance

Many managerial staff indicated that the initial guidance which was available to support the implementation of the new target was inadequate and fragmented, with no single comprehensive and easily accessible reference point available to them. A number of managers stated that, following implementation, information on the different elements of the target was delivered to them in a piecemeal fashion and that they received mixed messages, particularly around the IB element. In some cases this caused a degree of confusion as to how elements of target performance were being measured and what activities would have an impact on performance against the target.

'It [IDT] is relatively straightforward once the people are absolutely clear what is being measured, but the problem that we had was, particularly for example IB, it just wasn't. It's so obvious that you must not book any appointments early. It's like a mantra now! Everybody knows in the whole organisation, do not book any appointments before week eight, but it was never put across quite that simplistically beforehand. It looked like a very complex target, there were lots of different timescales and measurement periods for the different customer groups and the different interviews and to be honest the intranet site was pretty poor. If you went on the intranet you couldn't track, you couldn't get all the right information all at the same time so it was just a confused picture and so although everyone knew we were going to have problems with it, there wasn't one simple place where the simple instructions of how to get this right were contained.'

(Customer Service Director, Stage One)

Whilst this general view was common, it was not universal and managers in two districts sampled as good performers indicated that they did not need to wait for detailed guidance on the target in order to prepare for implementation. Indeed, they were generally positive about the implementation of IDT and felt that this had been better than the introduction of some other targets.

'We certainly knew early what would be expected and pulled together some KMIs that already existed...we knew when it was needed and we were able to kind of almost do a shadow, a check to see where we were in terms of performance last year and how it would transfer into IDT target for 2007/2008. By doing that we knew where we had to tighten and what additional work we needed to do.'

(District Manager, Stage Two)

3.2.4 Targeting communications

A common theme from many interviews with front line operational staff was that because of the significant volume of information that is presented to them on a day-to-day basis there is a tendency to 'switch off' to what they feel is not immediately relevant to their role. This was a particularly significant issue for staff within Contact Centres and BDCs where levels of awareness of IDT were lowest. Staff in these locations, who had any awareness of IDT, tended to view it as a Jobcentre target, although when prompted they could usually see how their role contributed to the process.

When these staff were asked about any information they had received about IDT or Jobcentre Plus targets they stated either that they had not had any, or that they had vague recollections of something earlier in the year. They often went on to explain that as they thought this information was not really relevant to their role it was something they did not need to know about.

In response to a question asking for any suggestions on improvements to communications about IDT or targets more generally, a significant number of staff highlighted the importance of tailoring the information offered to make it relevant to their specific role.

'I have seen bits on the intranet and probably had emails, but unless they really affect us, we are quite busy, unless it kind of jumps out of you, it completely affects your day-to-day job, you tend to just ignore it.'

'Sometimes I think when you get the communication through, there is too much there and if it becomes too involved then you have a tendency to start to glaze over a little bit. From my point of view, being a busy processor and also a supervisor...then I find that sometimes if there is too much information, you are blinded with science and it needs to be more direct and deliver more impact on you personally.'

(Benefit Processors, Stage One and Two)

Both Contact Centre and BDC managers appear to have adopted a pragmatic approach with regards to what their staff needed to know about the IDT. Once it became clear that there were IDT performance issues related to the tasks carried out by FCOs, performance improvement activities tended to be promoted via the task (Jobcentre Plus (JP) Markers) rather than linked specifically to the IDT. However, in order to reinforce the message about why it was important to ensure that markers were set correctly staff were given information on the impact of not doing so.

Similarly, BDC managers had made a clear link between the achievement of their target for the processing of benefit claims, the Average Actual Clearance Time (AACT) and their directorate contribution to IDT, i.e. as long as they were achieving AACT then they were also achieving their contribution to the IDT. In that way they felt that processing staff did not need any additional information on IDT and should maintain their focus on AACT. (Further details on the operational processes

linked to the IDT are described in Chapters 4 and 5.)

3.2.5 Timing of communications

As described in Section 3.2.2, many staff felt that information was not made available to them in a timely way and arrived a little at a time rather than as a comprehensive package. Whilst this was a common concern for many staff during Stage One, by Stage Two CSD staff were generally more comfortable working with the target, and did not refer to limitations in the guidance as a significant issue, although this did not appear to be linked to the availability of any new guidance or supporting materials.

The timing of guidance remained, however, a significant concern expressed by staff in Contact Centres who felt that information specific to their role was provided a number of months after implementation. This meant that they were not made aware of the contribution their role played in achieving IDT performance, and the importance of this both to customers and the organisation as a whole, until poor performance was apparent.

'I would like to be told about them [targets] beforehand, so that we know and can prepare and actually do the job, not be told about it until six months after it has been introduced, it is not good.'

(FCO, Stage Two)

3.2.6 Communication methods

In addition to a need to review how messages are delivered, to ensure that information is filtered and staff can easily access what is most relevant to them, a significant number of staff also raised generic issues about communication methods. The majority of front line operational staff expressed a preference for face-to-face methods of delivery rather than via e-mail or the Intranet. A number of managers also highlighted that they found face-to-face communication to be the most effective way of providing information to front line staff.

'If you put something out by email then the chances are it will get lost. If it was on the intranet then it won't get read. It has to be on a face to face basis. Preferably by your manager in your office, rather than someone coming from central teams.'

(District Performance Manager, Stage Two)

However some staff did acknowledge the constraints of the busy environment in which they were working and why e-mail communications were often necessary. They suggested that, where possible, face-to-face communication should be used to highlight important new issues, with electronic and/or paper based-media used to provide additional supporting information or as a point of reference.

Some senior staff suggested that overall, insufficient resource was invested in communicating effectively with staff to ensure the successful implementation of the IDT as a new target. They described how, in the past, specific events had been

used to successfully launch new targets across the organisation. There was also a sense that this kind of proactive preparation would have been more cost effective than the reactive performance improvement activity which was required shortly after the implementation of the IDT.

'I would have liked to have seen more of a launch for IDT in terms of possibly workshops to introduce it to operations because, I think sometimes it's difficult for people just to get a book on their desk and "that's your target". I mean we've done it before when we've implemented brand new targets, well we've gone out and run workshops and if you can actually explain to people why you have that target and the rationale behind it you can actually get them committed better than if you just give them a book and say "here you are" because a lot of people in workshops situations learn a lot more, and the time is taken then for them to learn as well which isn't always the case with a piece of guidance.'

'I think possibly the amount of work that's had to be done in retrospect to improve performance for this target, the initial outlay if you like, would more than have covered the costs of the retrospective work.'

(Target Strategy Team member, Stage One)

3.2.7 Operational support for implementation

There was a general view, particularly in Stage One, that the operational requirements of the new target were not clear until after the target had been introduced. This was highlighted by a degree of uncertainty about how the target was being measured and what operational issues would have an impact on performance. Staff also referred to the fragmented nature of implementation guidance, and expressed a view that guidance was not specific enough for some areas of the business.

All of this tends to suggest a need for improved operational input to support the implementation of new targets, including the development of guidance. Without a very clear understanding of the implications of a target for each area of the business, including what is required from individual staff groups, it is not possible to develop adequate guidance and go on to ensure that the relevant information is then communicated appropriately. There was, however, recognition from some staff that it may not be possible to address all of the operational issues that emerge from working with new targets prior to implementation, as often these only become apparent after the target is operational.

3.3 Ownership of the target

A theme related to many of the communications issues highlighted above and some of the operational issues which are described in Chapters 5 and 6, is a broad question of who owns responsibility for the delivery of the IDT. Whilst target performance is predicated on delivery across the three operational directorates of Jobcentre Plus (Contact Centre, Benefit and Fraud (BFD) and CSD), the majority of

staff at all levels within Contact Centres and BDCs described the IDT as a Jobcentre target. There was a clear message that whilst they may contribute to performance it was not a priority for them.

3.3.1 Shared organisational responsibility

When introducing an 'end to end' target like the IDT, contributions from all operational directorates are important and to some extent this issue may highlight a need for improved coordination and cooperation between directorates. This need to improve links across the organisation was particularly acute at one of the BDCs, where awareness of IDT was very poor and staff talked about the distinct separation between the BDC and Jobcentre staff feeling like of a return to the previous organisational model of Benefit Agency/Employment Service.

'We have come full circle as though we're two separate organisations again. ...because we've got separate organisations, separate command structures, so in effect we've got back to the Employment Services and the old Benefit Agency.'

(Benefit Processing Team Leader, Stage One)

There was also some evidence of a 'blame culture' where staff in one part of the business blamed another, e.g. Jobcentre staff blaming staff mistakes in Contact Centres or delays in benefit processing for their failure to hit the target. This was articulated quite strongly at a number of locations during Stage One, however, it was much less common during Stage Two, although issues related to a shared ownership of IDT and working across directorates remained a concern for some.

'Part of the difficulty we have now is with Jobcentre Plus broken into three component parts, three directorates, we don't always have a shared ownership of the targets that we have got and I think this one is a case in point. IDT, we make a contribution towards it and yet we don't actually own it in BFD, it is a CSD owned outcome, so we naturally tend to focus more on those that within BFD we do have ownership of and I think as we have moved from where Jobcentre Plus was a couple of years ago to where we are now, this has become a bit of an issue for us and I don't think we quite bottomed out yet.'

(IB Processing Manager, Stage Two)

3.3.2 Developing operational cohesion

The sense of divisions between operational directorates, described in Section 3.3.1, was not universal. During Stage One a number of staff referred to the Operational Delivery Networks which involved all three divisions and were described as functioning effectively. Some of these networks had clearly facilitated proactive preparation for the implementation of the new target and offered a route for the speedy resolution of difficulties where these arose. The only note of concern that was raised was with regards to the planned move to a virtual Contact Centre model, where district-based staff would no longer have a clear link to the Contact Centre that handled calls from their area.

During Stage Two many staff again referred to the Operational Delivery Networks as a route which facilitated contact with staff from other divisions, although there was a clear sense that many of the initial difficulties, highlighted in Stage One, had now been addressed. There was also a clear indication that if staff had any particular concerns they now had established contacts within the other parts of the organisation and difficulties could usually be resolved promptly.

In addition to the Operational Delivery Networks, many staff referred to the process of staff visits and 'shadowing' staff in other parts of the organisation to promote the understanding of each other's roles. These activities were particularly valued by front line staff, who felt it gave them significant insight into the issues faced by staff in other directorates. For example, Contact Centre staff felt they gained a much clearer understanding of the impact their activities had on other staff and customers. Visits were also organised to serve specific practical purposes, such as where Jobcentre staff were invited to one of the BDCs included in Stage One. These visits were organised to provide DASOs with training in the IT systems used for the processing of IB, so that they could directly access information on any claims that might be delayed, rather than needing to contact the BDC staff about this.

Managers also saw the value in the staff visits, and managers from Contact Centres highlighted that such visits could play an important role in staff development.

'We don't just send them out there for a cosy little visit, they go with an agenda, when they come back they do feedback, it is on their personal development plans, so it is not just a jolly for half day.'

(Contact Centre Business Performance Manager, Stage Two)

3.4 Conclusions

During Stage One staff awareness of the structure and purpose of IDT was variable across staff groups, with DASOs, Advisers and managerial staff generally demonstrating a good level of awareness. Benefit Processors and FCOs had a much more limited understanding and this pattern was broadly similar during Stage Two, although generally there were improvements in the levels of awareness within Jobcentres and Contact Centres.

The most commonly articulated concerns about the implementation of the IDT were related to the communications process. In particular staff articulated the need:

- for the timely delivery of clear and comprehensive guidance;
- for information tailored to the specific needs of staff groups;
- to use effective delivery methods, i.e. face to face to highlight important new issues, with electronic and/or paper-based media to provide supporting reference material.

There was also evidence of a need for improved operational input to support the implementation of the new target, including the development of guidance with support from all operational directorates.

Whilst there was some sense of divisions between operational directorates which might highlight a need for improved coordination and cooperation this was not universal. Staff highlighted effective District Operational Delivery Networks and the value of visits and '*shadowing*' staff in other parts of the organisation as a way of promoting cooperative working.

Overall, an increased investment in launch activities related to the IDT may have proved to be more cost effective than the reactive performance improvement activity required shortly after implementation.

4 Staff perceptions

During both stages of the study, staff were asked questions about their general views of the IDT, including positive aspects and any areas which they felt required improvement. They were also asked some specific questions about how they felt the IDT fitted with, and supported, other Jobcentre Plus targets such as JOT. As there were clear links in the responses to aspects of these two topic areas they have been brought together within this chapter of the report.

4.1 Positive perceptions of the Intervention Delivery Target

One of the CSD managers interviewed in Stage One expressed reservations about the way in which the IDT had been promoted as a '**process measure**' rather than something more directly linked to customers. Whilst many managers involved in the study did discuss the processes related to the IDT, the majority of staff referred to the relationship between the IDT and customer service. There was a strong view that the target supported good customer service and this was the basis of the positive staff perceptions of the IDT, found across both stages of the study. This link with customer service is described further in Section 4.2 which highlights staff views on the links between the IDT and other Jobcentre Plus targets.

4.1.1 The focus on priority customers

In addition to the view that the IDT supports customer service in general, a number of staff also highlighted the elements of the target which focus on work with priority customers, i.e. lone parents and IB customers. Many staff across Contact Centres, BDCs and Jobcentres highlighted the focus on IB customers as a helpful development, suggesting that this group had previously been neglected. Staff also indicated that in their experience many customers in this group do express a wish to return to employment and there is evidence that they can do so with the right help.

'The majority of people I speak to they want all the help and support that they can get, so I do feel that setting up the correct interviews and the correct opportunities for the customer, it can only be a good thing. Also it is focusing a little bit more on the customer as well, especially in cases like incapacity, where I think again, only in my opinion, in older days customers could go onto that benefit and almost get forgotten about.'

(FCO, Stage Two)

A number of lone parent advisers also discussed the importance of meeting with their customers during WFIs, even where it was unlikely the customer would be in a position to return to work in the short-term. The advisers highlighted the importance of offering information that customers would be able to use in the future, when their circumstances had changed.

4.2 Links with other targets

When staff were asked about their views on the links between the IDT and other Jobcentre Plus targets, those most commonly identified were JOT, Customer Service, Monetary Value of Fraud and Error (MVFE), and AACT. In particular, CSD staff focused on the links between the IDT and JOT, whilst BDC staff most commonly referred to AACT.

4.2.1 Supporting the JOT

Staff across all districts involved at both stages of the study highlighted a supporting link between the IDT and JOT. Many stated that a customer attending a WFI at the appropriate times, as specified within the IDT, has a positive impact upon the customer's chances of finding employment and make a contribution towards job outcomes.

'If we are conducting interviews at 13 and 26 weeks for example, if we are doing our IB WFIs, and we are talking about the potential for getting into work...if we are doing our checks and interviews at the due times, we should then be capturing the customers at the policy intent times, which should be then, that we are making sure we are giving them the direction, the guidance, the support...at the right time in the claim to get them into work.'

(CSOM, Stage Two)

Although many staff stated their belief in a link between the IDT and JOT this was based upon a 'common sense' or theoretical view of how the two targets were related and they were unable to offer any hard evidence of a positive correlation between the two. In fact the majority of districts which could demonstrate good performance on the IDT indicated that they had relatively poor JOT performance. There were also districts which highlighted being poor performers on the IDT, which had good JOT results. This negative correlation led many staff to question whether there was a direct link between the IDT and JOT, whilst at the same time

maintaining their belief that seeing customers at the specified times should have a positive impact.

The lack of evidence for a supporting link between the IDT and JOT did lead some districts, in particular those with good JOT but poor IDT performance, to question the value of the IDT. Staff in one of these districts felt that as they demonstrated good JOT performance, they should not have been criticised for failures to perform well against the IDT.

'We're measured on job outcomes...now as a district at the beginning, throughout the year we have exceptional performance on JOT...so we're actually fulfilling the fundamental task for the government of getting people off the register and into work. We weren't achieving IDT at the beginning of the year, so we were being hammered for that but we were saying "hey what's the endgame, it's not to actually interview them it's to get them off into work".'

(District Performance Manager, Stage Two)

Whilst only a few staff questioned the evidence about the relationship between the IDT and JOT in Stage One, this was much more common during Stage Two. A number of suggestions were made as to why there was no apparent correlation between performance against the two targets and these were usually related to views about the make-up of JOT, rather than to questions about the value of the interventions monitored by the IDT. There were three broad issues related to JOT configuration: firstly a suggestion that JOT performance targets were set at unrealistic levels, secondly issues related to the recording of job outcomes and finally issues related to the timing of JOT performance data.

4.2.2 JOT performance levels

A number of staff questioned the levels set for JOT performance, stating that these were unrealistic. They suggested that this was the underlying reason for poor performance against JOT, rather its being due to limitations of the Jobcentre Plus interventions monitored via IDT.

'My performance and all the indicators, things like IDT...our penetration rate, some of our other KMI's...our rate of submission to jobs are really high, but our JOT performance is the worst in our region. That's difficult to equate... but I think that you've got to put it in context. Our JOT performance is JOT performance against target and profile. So you've got to look at how the targets are set in the first place and I think unfortunately this was a high performing district when the targets were set and the amount of stretch has been correspondingly bigger but I think that as time goes on we don't have the resources invested in us pro rata.'

(District Manager, Stage Two)

Another District Manager expressed similar concerns that the targets to be achieved in relation to JOT were unrealistic.

'We have similar expectations in terms of the outcomes that we are expected to get as [City] has. [City] has much higher population, much higher live loads; it just doesn't make any sense whatsoever.'

(District Manager, Stage Two)

4.2.3 Customer groups and recording job outcomes

Another suggestion put forward to explain the lack of evidence of a direct relationship between the IDT and JOT arose from the employment profile of IB and lone parent customers. It was suggested that customers from these two groups moving into employment are often employed for less than 16 hours per week and in these circumstances the employer does not have to inform HMRC of the customer's employment and so it may not be recorded as a job outcome. These perceptions about the recording of job outcomes are inaccurate in as much as the obligation to inform HMRC is linked to the income tax threshold, rather than hours worked, i.e. the employer is not obliged to inform HMRC (via a P45/6) until an employee reaches the income tax threshold. There is, however, less likelihood of an employee reaching this threshold if they enter part-time work of less than 16 hours, so the general issue raised with regard to the recording job outcomes may still be valid in a number of cases.

Advisers often stated that lone parents choose to enter part-time employment for family and childcare reasons and to ensure that they receive the full tax credits that are available to them. With regard to IB customers, Advisers commented that if customers have been on benefits for long periods of time it is highly unlikely that their first move into employment will be above 16 hours per week. In fact, Advisers pointed towards the fact that doctors will advise some long-term IB customers to find work at these lower levels in the initial phase of moving back to work to avoid any negative impact upon their health or medical condition.

'A lone parent with child caring commitments, it's very hard for them to move from having not worked for a considerable length of time to a 30 hour plus job...and for someone who's been on Incapacity Benefit, it's a good half way house and the doctor's usually quite happy to support them doing something like that.'

(Advisory Service Manager, Stage Two)

Further discussion of the relationship between the IDT and JOT focused on the time that it might take for IB and lone parent customers to find employment, as compared to JSA customers. Staff described the long-term nature of their work with many lone parent and IB customers, stating that it would be some time before work undertaken since the implementation of IDT would be reflected in job outcomes.

4.2.4 JOT performance data

In addition to the issues highlighted above, with regards to the long-term nature of work with lone parent and IB customers, some senior staff highlighted the

significant time delays inherent in the production of JOT performance data. It was suggested that the delays in the availability of JOT data mean that it would be some time before the true impact of the IDT upon JOT was apparent.

'The delay factor is so big, JOT is six months behind anyway, so therefore you are not going to see anything, what we do in IDT now will affect JOT in six months time, but then actually it won't be six months time because if that is their first appointment with an adviser, then you have got a series of interviews...I think you might get to that point when you have got two whole years worth of JOT performance...and two whole years of IDT performance and you might be able to plot them against each other and see improvement.'

(Customer Service Director, Stage One)

Staff at district and local office level were also concerned about the delay in receiving JOT performance data and the difficulties this can present in managing performance against that target.

4.2.5 The IDT and other targets

In addition to views on the relationship between the IDT and JOT, many staff highlighted links with a number of other Jobcentre Plus targets including Customer Service, MVFE and AACT.

4.2.6 Customer Service

As described in Section 4.1, many staff in both stages of the study saw a clear link between the IDT and customer service. By this, staff were not referring directly to the Jobcentre Plus Customer Service Target, which assesses the professionalism, timeliness and quality of information provided by staff via a range of techniques such as 'mystery shopping'. In general, they were describing a view that the IDT ensured that customers were offered the level of service to which they were entitled, i.e. timely access to support that could help them find work.

'It is important that customers have timely and quality interventions as they're entitled, and what IDT does is, it measures that much more robustly and it places that emphasis on doing that and if we do that successfully then, you know, you would hope there would be a correlation of the number of people moving into work as a result of it, and that's got to be right and proper.'

(District Manager, Stage One)

However, one senior manager did describe the IDT as a '*better measure of customer service than the Customer Service Target*'. In addition, when staff discussed their view of the IDT as helping people into work, some also described the importance of employment as a way of helping disadvantaged people out of poverty. Many staff clearly valued the role that Jobcentre Plus plays in helping disadvantaged people to improve their situation via work and were committed to their part in that role.

4.2.7 MVFE

A number of staff referred to a link between undertaking regular interviews with customers and increased opportunities for detecting possible cases of fraud. In this way they felt that there was a link between the IDT and the element of the MVFE target, which aims to reduce losses from fraud.

4.2.8 AACT

As noted in Section 3.2.4, BDC managers could see a clear relationship between the achievement of the target for the processing of IB claims (AACT) and their directorate contribution to IDT. This link was also apparent to CSD staff who highlighted the fact that any delays in the processing of IB claims had a negative impact on their ability to achieve or maintain the IB element of IDT performance.

4.3 Staff concerns and suggestions for improvement

During Stage One staff were generally positive about the introduction of the IDT, and few questioned either the rationale or the structure of the target. In Stage Two, as staff appeared to become more familiar with the IDT, a small but significant number raised concerns over two particular areas: Firstly they questioned the significant resource that appeared to be required to achieve IDT performance, in the face of limited evidence of a positive impact on job outcomes, and secondly the timings of some of the interventions which are monitored by the IDT.

4.3.1 IDT resource requirements

It was clear that a significant resource had been required to introduce and manage IDT processes. In Stage One there were no notable concerns about this, however, in Stage Two a number of staff were concerned that this seemed not to have resulted in improved job outcomes. Staff questioned whether the resource going into the IDT processes is actually cost effective if more customers are not finding employment. In particular, the extra resource that has gone into booking processes, checking schedules, and closely managing diaries has been questioned.

'It takes huge amount of time of my performance team, a huge amount of time. Time that I would much rather spend on other activities. A huge amount of monitoring and checking and constant up skilling of staff, simply to get this process absolutely right. I will become a convert when somebody demonstrates to me that this IDT has a positive effect on job outcomes for people but I remain agnostic until that MI emerges.'

(District Manager, Stage Two)

4.3.2 Timing and content of interventions

Another area where staff had some concerns was in relation to IDT requirements for the timings of interventions. In Stage One the majority of staff stated that they 'assumed' the specified intervention times must be appropriate, however, in Stage Two a number of staff were questioning these timings. There were particular

concerns that undertaking interviews at the specified times was not creating significant improvement in job outcomes. Some Advisers suggested that if the intervention was of a high quality it would not matter whether an IB customer is seen, at week six, seven or eight (see Section 4.3.3).

Some staff were also concerned about the impact of diverting resource into ensuring that interventions occur within specified timeframes at the expense of ensuring that the content of the interventions was appropriate. Advisers also commented that they had a multitude of tasks to undertake during a WFI and had less time to concentrate on in-depth work, focusing on the barriers that customers face to finding employment.

'If you are asking is there a contradiction, it is probably in the wider picture... we are spending more time getting the activities in place and on time and therefore we have got less quality time to delve more deeply into the work issues of the customer...it is a bit more that that really. It is not just quantity, quality; it is about the type of work we are doing. We are not doing as much work at the initial stages to really get underneath the issues and barriers for customers and that probably gets onto the next issue. Maybe that has an impact on JOT.'

(District Manager, Stage One)

This issue is explored in more depth in Chapter 6.

4.3.3 Areas for improvement

When staff were asked if there were any aspects of the target structure which they felt required improvement, the two most common issues raised were in relation to the timing of the IB element and the sampling of cases for the JSA elements.

4.3.4 The IB window

One of the most commonly suggested areas for improvement at both stages of the study was in the perceived need for some increased flexibility with the IB element. Whilst staff understood the rationale for the current timeframe, they felt that, if appropriate, they should be able to see customers earlier than the target date and highlighted situations where they felt customers would have benefited from earlier contact with Advisers. If an earlier interview was undertaken, they suggested it should not need to be repeated at the mandatory point in order to meet the target.

'The ideal window would be maybe 6-13, but they must be seen by 13 weeks...we might see people now and it is wrong for them, but [for] some people it would have benefited to see them at day one. I think some customers, they may prefer to come in sooner.'

(CETL, Stage Two)

4.3.5 JSA case checks

Throughout Stages One and Two staff expressed concerns over the reliability of the sampling method used for the JSA case checks. In particular, district-level staff were critical of the sample size as they regarded it as too small to be reliable at local site level. Whilst some did acknowledge that the sampling was actually designed to be valid at district level, they were concerned that it was of limited use when working to improve performance at local site level.

For example, within Jobcentres, staff gave examples of months where they knew they had performed poorly but performance for the month was reported at 100 per cent.

'The 13/26 and the LMI, I'm least happy with because that's done through sampling from a scan at regional level. The sample sizes are very small, in fact they are not statistically valid at local office level...if you've only had two checks done in an office with a register of 2,000, if they get them both right then they'll be quite happy. If one is wrong they are 50 per cent, I can understand them feeling...you've only checked two out of the whole register, how is that a fair sample. I would like to see a different method for measuring the 13/26 and LMI rather than the very small process that we've currently got.'

(District Performance Manager, Stage Two)

4.4 Conclusions

There was a strong view amongst staff that the IDT supported good customer service and this was the basis of the positive staff perceptions of the IDT which were found across both stages of the study. Many staff also identified the focus on IB and lone parent customers as a helpful development and when discussing how interventions help people into work, some staff described the importance of employment as a way of helping disadvantaged people out of poverty.

Staff highlighted the links between the IDT and other Jobcentre Plus targets, in particular JOT, suggesting that, as the IDT helps to ensure customers attend WFIs, this must have a positive impact upon job outcomes. However, staff were not able to offer evidence of a positive correlation between the two targets. A number of explanations were offered for this, raising questions about the configuration of JOT, rather than about the value of interventions monitored by the IDT.

There was a suggestion that JOT performance targets were unrealistic, that not all relevant job outcomes are recorded and that the delays in JOT data mean that it will be some time before the impact of the IDT upon JOT is clear. Staff also suggested that because of the long-term nature of the work with IB and lone parent customers, interventions undertaken since the introduction of the IDT would not yet be reflected in job outcomes.

Some concerns about, and suggestions for, the improvement of the IDT structure were also raised. Given the absence of evidence of a positive correlation between the IDT and JOT some staff questioned the level of resources required to support IDT processes. Staff also perceived a need for increased flexibility with the IB element of the target and suggested that the sampling related to the JSA element required review.

5 Working with the Interventions Delivery Target in Contact Centres and Benefit Delivery Centres

The IB element of the IDT requires 80 per cent of initial IB WFIs to be carried out after the end of the eighth week and up to the end of the 13th week of the claim. This was described by many staff as one of the most challenging elements of the IDT, not least because target performance is predicated on delivery in three operational areas Contact Centres, BDCs and Jobcentres. This issue of a shared organisational responsibility for the delivery of the IDT was discussed in Section 3.3.1 and the operational issues to which this relates within Contact Centres and BDCs are explored within this chapter.

5.1 The process of managing new Incapacity Benefit claims

New claims for IB are normally received within Contact Centres, where FCOs elicit and record the relevant information from the customer. Two of the tasks carried out at this point are to identify the claim as IB and to allocate the customer to the appropriate Jobcentre by correctly setting the 'JP Markers' within the customer record. A document containing the information gathered from the customer is then sent back to them, to be checked and returned to the Financial Assessment Team at the Jobcentre. From there the documentation is passed to the BDC where the claim is processed and once it has been established that the customer is eligible for the payment of IB an initial WFI can be arranged by the Jobcentre.

As noted already, many staff suggested that the IB element of the IDT is the most demanding part of the target and particularly during Stage One a number of Jobcentres appeared to be struggling to achieve the required levels of performance. Section 3.3.1 describes evidence of a 'blame culture' where staff in one part of the organisation blamed staff in another for poor performance, e.g. Jobcentre staff blamed staff in Contact Centres and BDCs for their failure to hit the target. This was articulated quite strongly at a number of locations during Stage One, although it was much less common during Stage Two. The operational issues underlying these staff concerns are described in the following sections.

5.2 Contact Centre process

A number of operational issues which may have an impact upon performance were identified within Contact Centres and the two most directly related to the IB element of the performance were:

- correct setting of JP Markers within customer records (i.e. IB claim and appropriate Jobcentre);
- IT system generated 'ghost' records for the partner of customers making an IB claim.

The second issue appeared to have been resolved by Stage Two of the study, but the issue of setting markers correctly remained relevant to the Contact Centre handling of IB claims.

5.2.1 JP Markers

Contact Centre staff generally acknowledged that errors did occur when setting markers within the customer records, though what was not clear to some staff, particularly during Stage One, was the impact that incorrect markers would have on the process of setting up appropriate interviews with customers. This correlates with the findings reported in Section 3.1, regarding low levels of awareness of the IDT amongst Contact Centre staff. It also highlights the need for improved operational input to the implementation of new targets including tailored guidance for specific staff groups such as FCOs.

If a customer making an IB claim does not have the primary benefit marker set to 'incapacitated/disabled' then the timing for their initial WFI will be incorrect (IB customers are not due to be seen until after the end of the eighth week and up to the end of the 13th week of the claim). They would also not be allocated an interview with an Incapacity Benefit Personal Adviser (IBPA).

If the marker which identifies the customer's Jobcentre is not reset it defaults to the originating Contact Centre. In this case customer details are not passed through to the interview schedule generated at the Jobcentre but appear on the JP process report within the Contact Centre. During Stage One, the Contact Centre staff had only recently become aware of this issue and staff resources were being allocated to clearing these reports by resetting the JP Markers to the correct Jobcentre.

In addition to the inconvenience to customers, when the JP Markers are reset it also restarts the clock on the automated process by which IDT performance is measured. Jobcentre staff are then placed in the position of having to decide if they should attempt to organise the WFI to meet the policy intent of the target, i.e. see the customer after the end of the eighth week and up to the end of the 13th week of the claim, or schedule the WFI to ensure this meets the requirements of the measurement process on which IDT performance was based. This issue is discussed further in Section 6.5.3.

5.2.2 Contact Centre performance constraints

Whilst correctly setting two markers within a customer record may appear to be a fairly routine task, when placed within the context of the FCO working environment it is clear that there are a number of issues which potentially hamper performance. These are related to the complexity of the FCO role, the IT systems being used and the number of new initiatives being introduced within Contact Centres. Managers also identified staffing issues such as the introduction of a number of redeployed staff and the recruitment of new staff who do not have basic level IT skills.

5.2.3 Complexity of the FCO role

The role of the FCO requires the ability to 'multi task' in that they have to talk to the customer on the telephone, asking questions to obtain pertinent information and listening carefully to ensure that they accurately capture what the customer is saying. These conversations are guided by a script which is documented within the IT applications they use and they simultaneously record relevant data into other areas of these applications.

An additional complexity lies in the fact that they have to switch or 'toggle' between numerous applications in order to complete the process of a single call. Staff also raised the fact that many of the applications they use have limitations, in that they do not support current operational practice. On more than one occasion staff suggested that systems are not fit for purpose resulting in the proliferation of paper based 'desk aides', which they also need to refer to when handling calls.

They are trying to align the systems and get them better but I think it's sort of 'cart before the horse', we're trying to do things before we've actually got IT fit for the purpose, I suppose.'

(Business Development Manager, Stage Two)

One example of this type of difficulty is that JP Markers automatically default to the incorrect setting of the Contact Centre, rather than prompting the FCO to select the Jobcentre which covers the customer's location. The process is, therefore, reliant on staff remembering to change the default setting, rather than supporting them to make the correct selection.

'I think that the whole process is open to the staff forgetting...if it was a mandatory part of the screen and they couldn't skip by it, it would be far better, because it would catch more. The way it is now is, if they don't do it, they forget about it and they can move screens. But if it was mandatory and they couldn't move screens on we wouldn't have to keep doing the reminder.'

(Business Development Manager, Stage Two)

FCOs suggested that at busy times the pressure to complete calls and move on to the next one, combined with the complexity of the systems they are working with, means it is easy to make mistakes with processes such as setting the JP Markers.

'The only reason that we may not have all the markers set correctly is calls coming in, pressure of calls coming in. Monday is a very busy day for us, there is a lot of stuff that we do outwards speaking to the customer, after call work, these things have to be done when you are on the phone to the customer, if it is very busy you're conscious of getting off the phone to this customer and dealing with the next customer, that is where errors can happen.'

(FCO, Stage Two)

Managers within Contact Centres also highlighted the fact that the nature of the FCO role requires a reasonable degree of IT literacy and when they are recruiting new staff they do try to select on this basis. There was, however, a concern that this was not stipulated as an essential requirement in advertisements for the post.

'We try to find out which ones are more IT literate than others, because we don't specify, when we advertise, the jobs that would require IT literacy, which is a shame. They need eight applications up while they're doing their job and if you're not great on IT, if you're whizzing backwards and forwards between screens it's easy to forget.'

(Business Development Manager, Stage Two)

5.2.4 Multiple initiatives

The introduction of new structures and systems across Jobcentre Plus was an issue raised by many staff, in all parts of the organisation. A number of managers suggested that the introduction of the IDT was one of a plethora of initiatives with which staff were dealing with. They referred to *'initiative fatigue'* and suggested that staff are only able to deal with a certain amount of change at any one time, which explained why some staff were struggling with the new target.

This issue appeared to be particularly acute within Contact Centres, where staff were dealing with the introduction of a significant number of new working processes. The Business Development Manager at one of the Contact Centres visited in Stage One highlighted a number of recent and imminent changes including the introduction of the single call process, a new workforce management programme, new releases of the key operation systems, CMS and LMS, and the pilot of a new call coaching process.

This view was echoed by Contact Centre staff involved with Stage Two of the study, who described the difficulties which can be associated with what may on the surface appear to be a relatively simple change.

'Our staff have to deal with the introduction of a significant number of new working processes almost on a weekly basis and the resource implications of that for my team leaders, almost from the business support team right through to my team leaders and down to the staff is that they have on paper what seems like a relatively straightforward job of going on the phone and reading a script, because of every change that is introduced to them they then have reams and reams of desk aids and papers that they need to work their way through to enable them to handle that.'

(Contact Centre Manager, Stage Two)

5.2.5 Contact Centre performance improvement activities

Once it was clear that errors within Contact Centres, in particular with regards to the setting of JP Markers, were contributing to difficulties achieving the IB element of the target, a number of performance improvement activities were implemented. These activities included the preparation of a tailored IDT presentation, guidance on running JP process reports to check markers were being set correctly and the production of specific desk aides.

In addition to this a 100 per cent JP Marker check was introduced into Contact Centres shortly after Stage One of the study was completed. Whilst staff at one of the Contact Centres visited as part of Stage Two highlighted that this 100 per cent marker check was being carried out on a daily basis, staff in the second Centre indicated that whilst they were aware of this requirement they did not have the capacity to implement it. They suggested that in reality around 20 per cent of markers were checked.

As noted in Section 3.3.2, a number of staff commented positively on the value of opportunities to visit and shadow other staff within different areas of the organisation. They suggested that this was a very effective way of highlighting the impact of their activities on work in other parts of the organisation and ultimately on customers. Contact Centre staff felt that visits promoted understanding of the importance of ensuring that tasks such as setting JP Markers were accurately completed and more generally encouraged cooperative working across the organisation.

5.3 Benefit Delivery Centre process

IB claim information gathered from the customer is passed to the BDC where staff process the claim to establish if the customer is eligible for IB. The AACT target for the BDCs to process IB claims is an average of 18 working days and once the claim is processed the BDC issue form JCP 21 to notify the Jobcentre that the customer is eligible for IB. An initial WFI can then be arranged within the appropriate timeframe as specified by the IDT.

Therefore, if BDC performance against the AACT target of 18 days is being achieved, there should be adequate time to ensure that the IDT timescale for initial IB WFIs is met. BDC managers interviewed at both stages of the study had made the link between the achievement of the AACT target and the BDC contribution to the IDT, i.e. as long as they were achieving AACT then they were also achieving their contribution to the IDT (see Section 3.2.4).

5.3.1 BDC performance constraints

BDC staff described the processing of IB claims and identified a number of areas which can limit their ability to process claims in a timely way. The main issues were related to delays in receiving the supporting information required to process a claim and, more generally, the limitations in the IT systems which support this area of activity. Managers also raised issues of staffing constraints and increasing workloads.

5.3.2 Information to support IB claims

Whilst in theory an IB claim should arrive at the BDC with all of the relevant supporting documentation, processors noted that this is often not the case. Examples of the key items required to support IB claims which are often missing include supporting medical evidence, details of the customers' employment and Statutory Sick Pay forms (SSP1s). In these circumstances the BDC staff contact the customer to request these items and the processing of the claim will be delayed until this information is available. For more complex claims, for example where a customer has come from abroad, or where there are problems with their National Insurance account, these delays can be significant.

BDC staff suggested that Contact Centre staff sometimes omit to give the customers details of the supporting information that is required for their claim, in particular the SSP1, and this leads to unnecessary delays. Some processors also questioned the role now played by the Financial Assessors in Jobcentres, stating that until quite recently the Financial Assessor would check over the documentation before it was forwarded to the BDCs. They suggested this check seemed no longer to be happening and therefore, questioned the value of this part of the process, which may simply add a delay to the time taken for a claim to reach the BDC.

5.3.3 IT support for IB processing

Along with the delays associated with the failure to receive information many processing staff also described the inadequacies of the IT system they use to process IB claims, the Legacy system. This system has very limited links with the other key systems used within Jobcentre Plus to manage Customer information, CMS and LMS. Thus, customer details collected in the Contact Centre are not electronically transferred but arrive in the BDC as paper documents and the information then has to be manually entered onto the Legacy system. Some processors offered the view that the addition of the Contact Centre to the front end of the process for claiming IB offered little or no improvement to the time taken to process claims when in the past customers were simply given forms to complete and return.

'CMS was supposed to be the great solution for the claims coming in, from the Contact Centres, we were supposed to have up and ready claims given to us through CMS, but with IB of course, with IB CMS has really been obsolete. It has by passed IB with all its complexities. IB is still a largely clerical benefit, with a little bit of computer support quite frankly.'

(Benefit Processor, Stage Two)

Despite these difficulties many processing staff did indicate that they thought the target of processing claims to ensure that 80 per cent of initial IB WFIs could be arranged to meet the IDT target window was challenging but achievable. Three of the BDCs visited indicated that they were achieving AACT targets, although one of those visited during Stage One indicated that they were facing a significant backlog in their processing of new IB claims.

5.3.4 Staffing limitations

Managers at the underperforming BDC suggested that overall staffing reductions and low levels of experience in the new claims team had led to their difficulty in meeting clearance times. They described how overall staffing numbers had fallen as part of organisational restructuring and that more experienced staff from the new claims team had been redeployed to the newly introduced telephone enquiry service for customers. This BDC also described their difficulties being compounded by staff time being taken up with calls from Jobcentre staff enquiring about the progress of new IB claims, which had followed the introduction of the IDT.

Whilst clearance times were being met at the other BDCs managers at these sites did highlight some pressures related to increasing workloads with restricted staff numbers. Two of them described situations where they take in work from other BDCs who are overloaded and one stated that they would be taking in additional work from another BDC which was closing imminently. This manager had concerns that with the increased workload and no additional staff, clearance times would suffer and he suggested that if new IB claims were delayed this might have a negative impact on working relationships with staff at local Jobcentres.

5.3.5 BDC performance improvement activities

In common with staff in Contact Centres, a number of BDC staff commented on the value of opportunities to visit and shadow other staff within different areas of the organisation. This was seen as useful both in terms of developing organisation cohesion, more generally, and in dealing with specific operational issues. For example, the BDC which raised the issue of processors dealing with calls about IB claims from Jobcentres had attempted to address this by running awareness sessions for DASOs and CETLs. These sessions were used to demonstrate how Jobcentre staff could access information on the status of new claims from within the IB processing system. It was suggested that the investment of staff time to run and attend these sessions would lead to longer-term efficiencies in both Jobcentres and BDCs, by facilitating direct access to the information required by Jobcentre staff.

'We do have a database on the Legacy system about cases that are outstanding for a long time and reasons why...one of my staff's been doing awareness sessions for front-of-house staff, for using the Legacy system...showing them through the dialogues that they need to look at so that they've got some awareness of when a claim is processed and when it isn't...so they can have a look themselves. Which I think helps...so if they can look themselves that'll save us time, and themselves time as well.'

(Benefit Processing Team Leader, Stage One)

5.4 Conclusions

A number of operational issues were identified which can have an impact upon Contact Centre and BDC performance with relation to the IB element of the IDT. These were often related to shortcomings in the IT systems used by staff, which many regarded as unsupportive of current operational practice and exacerbated by low levels of staff awareness of the operational requirements associated with the introduction of the IDT.

Within Contact Centres the deficiencies of the IT systems greatly complicated the role of the FCO and it is perhaps unsurprising that errors occurred in areas such as setting JP Markers. Given the complexity of the systems used by FCOs, the omission of basic level IT skills as an essential requirement when recruiting staff to this role should perhaps be reviewed.

The IT system used to process IB claims within BDCs also appears to have significant limitations, in particular with regard to the links to other Jobcentre Plus customer management systems. Staff suggest that delays in the processing of claims are, however, largely related to gathering relevant supporting information from customers. Some review of how the FCO informs customers of what is required to support claims and the checks carried out by financial assessors prior to submitting claims to the BDC, may therefore, be helpful.

Overall, despite the issues described above, it is clear that once operational requirements related to IDT were apparent to staff, performance improvement activities were undertaken to address specific difficulties. Within Contact Centres and BDCs it would appear that these operational requirements were not identified until some time after the implementation of the target. When introducing new targets it could be helpful for each operational area to identify potential performance constraints and contribute to the development of appropriate staff guidance prior to implementation.

6 Working with the Interventions Delivery Target in Jobcentres

Working with the IDT requires Jobcentre staff to undertake customer WFIs within specified timeframes and to carry out JSA labour market interventions including follow-up activity for the case of non-availability or refusal to work. For IB, the requirement is for 80 per cent of WFIs to be carried out after the end of the eighth week and up to the end of the 13th week of the claim. For IS lone parent WFIs the requirement is that 85 per cent of interviews are conducted within three months of the due date and for JSA the requirement is for 13 and 26 week advisory interviews to be conducted within six weeks of the due date.

This chapter deals with the procedures in Jobcentres which support the undertaking of these interviews and with the impact on working practices and the management of performance.

6.1 Interview attendance

JSA customers are already required to attend a Jobcentre every two weeks as part of the process for claiming benefit and advisory interviews were often arranged on the customer's usual 'signing' day, which generally facilitated satisfactory levels of attendance. Staff indicated that ensuring adequate levels of customer attendance at IB and lone parent WFIs was more difficult and that achieving IDT performance in these elements of the target presented them with their biggest challenge.

Jobcentres have developed a range of strategies to address the challenges associated with ensuring adequate levels of customer attendance at WFIs to achieve IDT performance. A number of the constraints faced by staff and the practices put in place to overcome these difficulties are described below.

6.2 Booking processes

The processes for booking customer interviews were discussed with Jobcentre staff during both stages of the study. Whilst there were general consistencies in booking processes across districts, there were also a number of variations with regards to pre-calls, re-booking and waivers and deferrals.

6.2.1 Pre-calls

Across all districts pre-calls were undertaken as a mechanism for reducing the number of customers who fail to attend (FTA). It was the responsibility of the DASO team to carry out pre-calls, although there were some instances of Advisers assisting with this task.

A number of Jobcentres carried out pre-calls with all customers, although in other offices there was insufficient staffing resource to do this and consequently a decision had been taken to prioritise pre-calls with IB customers and new claimants. Staff were generally positive about undertaking pre-calls, often stating that this approach reassured the most vulnerable customers that they were not being 'forced' into employment. It also reminded others of their appointment the next day. Staff commented on the difficulty of contacting some customers as telephone numbers are frequently changed, with Jobcentre staff rarely being informed when this occurs.

Some managers also questioned the level of resource being allocated to interview pre-calls as part of a general concern regarding the resources allocated to support IDT processes. This issue is discussed in more detail in Section 4.3.1.

6.2.2 Re-booking interviews

The process for re-booking when a customer fails to attend was consistent across all districts in both stages and following an FTA, Advisers indicated that they carried out the appropriate follow-up actions (e.g. initiating sanctions where appropriate). Inconsistencies did arise, however, with regard to the number of re-books which Advisers deemed to be acceptable. In some offices there appeared to be a reluctance to sanction lone parent and IB customers, with re-books occurring on numerous occasions. In one office, visited in Stage Two, staff described a maximum of one re-book for lone parents regardless of the reasons given for non-attendance. Staff in this office indicated that this procedure had a positive impact on their ability to achieve IDT performance.

6.2.3 Interview waivers and deferrals

The majority of staff across all districts were clear that if the timing of a WFI was not appropriate for a customer due to health reasons then the interview could be waived or deferred. There were, however, examples of a reluctance among staff to waive and defer interviews because of the impact which this could have upon the IDT performance.

In one district, staff had attended a training session based on the guidance related to the appropriate circumstances in which to waive or defer customer interviews. At the end of the session, however, staff were discouraged from using this option because of its negative impact on the IDT.

'They gave you instructions about when you could waive and defer and when it came down to it they said, "Well we don't actually want you to waive and defer at all".'

(ASM, Stage Two)

Many staff acknowledged that the performance levels within the target structure were designed to offer sufficient flexibility for the waiver and deferral of a certain amount of interviews but there still appeared to be a reluctance to use this option.

'The customer rings up, they say "I'm in a terrible state, I really can't attend, give me a couple of weeks and I will feel better", and you can tell they are genuine, they have a health condition...and you think "yes I'd love to re-book that", on the other hand you know that you have the target to meet, so the target does come before the customer.'

(IBPA, Stage Two)

6.2.4 Carrying out 'overdue' interviews

During Stage Two Jobcentre staff were asked how they dealt with overdue WFIs, i.e. where interviews had not been undertaken within the specified timeframe. In the majority of offices staff stated that they would interview the customer as soon as possible. In one office, however, the manager highlighted that they would instruct staff to manage this process, i.e. if there was a significant number of interviews that had missed the IDT window in one month, the manager would advise staff to see a percentage of those customers during the next month, then the remaining customers the month after. It was explained that if staff attempted to fit in all of the 'overdue' customers the following month, this could have a negative impact upon IDT performance for those customers due to be seen in that month.

6.2.5 Centralised administration

In Stage One, the majority of offices visited had a centralised administration team which arranged all initial lone parent WFIs. Many staff commented positively on this arrangement as it relieved individual offices of some of the associated administrative burden. During Stage Two, however, one of the districts selected as a high performer had made the decision to take this administration back to local level to ensure that local staff had total control over all interviews, schedules, and booking procedures. Staff in this district favoured this model as any issues could be addressed locally, rather than via communications with a remote administration team.

6.2.6 IT issues

Staff across all districts in Stage One identified difficulties with the IT systems they used, viewing them as having a negative impact upon their ability to meet the requirements for IDT performance. Many of the issues described were related to intermittent faults such as the apparent disappearance of markers and 'hotspots' within LMS. Staff also highlighted the general difficulty of navigating the IT systems which often require quite high levels of competence in order for them to be used successfully.

By Stage Two very few staff within Jobcentres articulated similar concerns about IT. Generally, they acknowledged that IT systems could be improved but the problems highlighted in Stage One appeared to have been resolved.

6.2.7 Lone parent window

Throughout both stages of the study staff expressed concerns over the way in which the timeframe or 'window' for undertaking lone parent WFIs was calculated for the purpose of measuring IDT performance, i.e. the window is not necessarily three months from the due date.

Staff explained that if the last interview was undertaken at the end of a month, then the next window could be as short as nine weeks. In order to work around this issue staff tried to ensure that interviews with lone parents were carried out as near to the start of the month as possible, however, with the additional difficulties related to arranging lone parent interviews (discussed in Section 6.3) this potential reduction of the time available was regarded as problematic.

6.3 Customer behaviour and failure to attend interviews

Throughout the study staff pointed to aspects of customer behaviour, i.e. failure to attend interviews, as a major constraint on IDT performance. A reluctance and/or failure to attend interviews was highlighted as a particular difficulty when working with IB and lone parent customers.

Staff suggested that a significant number of IB customers questioned the appropriateness of the requirement to attend WFIs at the Jobcentre when, in their view, their health condition prevented them from entering employment. Advisers gave a number of examples of situations where they were in the position of being required to persuade IB customers who were clearly unable to work, to come into the Jobcentre to ensure that the IDT could be met. Whilst an option exists for advisers to waive or defer interviews where circumstances dictate, many advisers appeared to be hesitant to use it (see Section 6.2.3).

Staff described similar difficulties in working with some lone parent customers, in that many lone parents questioned why they were required to attend a WFI when they had very young children and would, therefore, not be considering employment in the near future. In addition to this, staff described a number of

practical constraints related to the arrangement of interviews with lone parents. For example, Advisers often stated that lone parents only wanted to be interviewed between 9:30am and 3:00pm, to fit in with the times when their children would be attending school. A lack of flexibility within Adviser diaries, (discussed in Section 6.4.1), presented some difficulties in accommodating all such requests.

DASOs also commented that many lone parents have frequent changes of address and telephone number and often do not inform the Jobcentre of this. Thus, the initial letter informing the customer of the requirement to attend a WFI may be sent to an incorrect address, which adds to the difficulty of arranging interviews within the required timeframe.

During Stage Two, staff were asked about the use of Adviser time when an FTA occurs. Generally, there were very few concerns that Adviser time was not being utilised effectively following an FTA. Staff listed a range of activities that Advisers could undertake, such as preparation for their next interview, caseload work or paperwork related to the sanctioning process.

6.3.1 Home visits

One of the districts visited during Stage Two arranged for an Adviser to visit the customer in their home following an FTA. The Adviser would investigate the reasons for non-attendance at the WFI, remind the customer of the requirement to attend the Jobcentre but more importantly, reassure them that they were not being 'forced' to find employment. This approach was viewed positively in the office as it often helped to encourage the customer to attend a WFI within the specified timeframes, therefore, ensuring the IDT requirement would be met. It was also seen to be particularly useful in reassuring the most vulnerable IB customers that visiting the Jobcentre would not be a 'daunting' experience.

6.3.2 Telephone interviews

Offices in the district which carried out home visits following an FTA were also undertaking some customer interviews via the telephone. Staff commented that although not substantial in number, telephone interviews were used as an option if the IDT window was going to be missed. Advisers also commented that this was a useful option, particularly with the most vulnerable customers who often showed a reluctance to attend interviews within the Jobcentre.

Within another district staff stated that prior to the introduction of the IDT they had used the option of telephone interviews as they felt it could provide a more customer-focused approach.

'Before I would ring up a customer and if they say... "I'm really anxious, I can't leave the house, I'm really too scared to come in it is making me feel ill"... I say, "how about I do the interview over the phone". We would do the interview... you allay their fears and... I say "look you have spoke to me, you realise I am alright... come in, in a month's time". So then I am giving them the opportunity to come in at a later date, but no pressure of targets, so I have done the bit of the interview, broken that barrier, made them aware of help available, and then would say "come in and see me when you feel a bit better" and it is more customer focused.'

(IBPA, Stage Two)

6.4 Jobcentre Advisers and the Intervention Delivery Target

6.4.1 Management of Adviser time

Along with customer behaviour, managers noted the most significant potential constraint on IDT performance was the availability of Advisers to carry out interviews. It was clear throughout both stages of the study that the close management of Adviser time was required to ensure that the IDT is achieved. Adviser diaries would frequently be fully booked with interviews, leaving very little flexibility or time for additional activities. Many senior staff stated that full diaries were essential to achieve IDT performance and some offices were overbooking Adviser diaries to ensure that there was no 'wasted' time if customers failed to attend.

Although many managers mentioned these pressures on Adviser time there was no evidence during Stage One of any direct impact on the time allocated to carry out interviews. During Stage Two, however, some evidence of WFIs being shortened in length to ensure that the IDT could be achieved was found within one district. Within this district interview times had been cut from 50 minutes to 20 minutes with the aim of addressing poor IDT performance. When this issue was explored further, staff stated that in order to complete interviews within this reduced time, job searching activities would be decreased or removed from the work they carried out with the customer.

6.4.2 Staff flexibility

During Stage One managers expressed a concern that the introduction of the IDT had reduced local flexibility to allocate staffing to meet peaks in customer demand, for example, where large numbers of new claims followed the end of seasonal work. Managers suggested that prior to the IDT some IB or lone parent interviews may have been deferred to meet such peaks in demand but since the target had been introduced this was no longer an option.

When this issue of flexibility was explored further during Stage Two, a different issue emerged. In order to address the demands of the IDT with a finite Adviser resource, a number of Jobcentres had moved away from the model of specialist

Adviser and DASO staff (i.e. lone parent and IB) and had introduced, or were developing, a 'multi-functional' approach. Thus, by Stage Two many Advisers and DASOs no longer specialised in working with JSA, lone parent, or IB customers. Instead staff were working across all customer groups. A number of staff and managers described the advantages of this approach as ensuring that they were better able to deal with peaks in demand and it was also seen as helpful for covering staff sickness and annual leave.

'I think that IDT has brought to the fore that more of our staff need to be multi-functional. What we've been working towards, especially in larger sites to give us a degree of flexibility...some sites had the foresight to start doing multi-functioning early but I think...a lot of sites now are going down that line 'cause they've seen the writing on the wall and that's the only way they can cope with...tight windows of time.'

(District Manager, Stage Two)

This flexible or multi-functional approach was regarded as particularly helpful in districts where Advisers worked in smaller, often rural, Jobcentres. Managers commented that it was far more efficient to have an Adviser at a small Jobcentre who was able to carry out interviews with all customer groups.

At one Jobcentre the ASM commented that an additional benefit to staff working across customer groups was that it prevented 'staleness' and the monotony of doing the same types of interviews all day, every day.

6.4.3 Quality concerns

Although staff were clear that the IDT had not been introduced to measure the quality of interventions, there were some general concerns about the potentially negative impact that a process related target can have upon the quality of what is delivered. A number of managers highlighted this 'quality versus quantity' issue during Stage One, although no one offered any specific evidence to support such concerns. During Stage Two, however, one district described cutting interview times from 50 minutes to 20 minutes with the aim of addressing their poor IDT performance (see Section 6.4.1). This would clearly have an impact on the quality of the work being undertaken with customers, as staff indicated that in order to complete interviews within this reduced time, job searching activities were decreased or omitted.

The links between the IDT and the Adviser Achievement Tool (AAT) were also discussed and although generally staff did not see a link with the IDT, they suggested that the AAT itself might have an impact upon interview quality. Senior Jobcentre staff pointed towards the process oriented nature of the AAT, in particular the number of tasks that must be undertaken within an interview to ensure Advisers achieve the requirements of the tool. Staff described concerns that the focus was being taken away from the end outcome of finding the customer employment, towards 'ticking boxes' for the AAT.

'I think my concern in it is that IDT in itself as a target, could drive some Advisers just to hit that rather than them focus on the quality of the intervention...we also have what's called an Adviser Achievement Tool where...to do certain benchmarks and I think in order to achieve that sometimes, you know the interventions are counted rather than the quality of the intervention.'

(District Manager, Stage Two)

Another senior manager expressed concerns that an Adviser could appear to be very effective in hitting their targets but this did not mean they were undertaking quality interventions or were a 'good' Adviser.

'The target is only about conducting an interview...I have concerns about that. It is very possible to be a highly successful adviser in terms of conducting interviews, and...the Adviser Achievement Tool...you can get 100 per cent on that tool, but not achieve any job outcomes. That can't be right, because the primary focus on our work is about supporting customers and trying to get them back into work. My concern is that we can do all of this and still not mention jobs.'

(Regional Performance Manager, Stage Two)

This general issue of process taking precedence over outcome is also discussed in Section 4.3.1. Senior staff, in particular, highlighted the significant amount of resource going into the IDT to ensure that all of the processes were being followed and were concerned that this was not being reflected in improved job outcomes.

A final dimension to discussions about the quality of interventions emerged during Stage Two when the issue of staff flexibility was explored (Section 6.4.2). The approach of developing 'multi-functional' staff prompted some staff to raise the potential impact this might have on quality and in particular, a small number of staff questioned whether multi-functional staff would have the specialist knowledge required when working with lone parent and IB customers. They suggested that specialist skills might be diluted if staff were to work across all customer groups, although they were not able to offer any direct evidence of a reduction in the quality of interventions delivered by multi-functional Advisers.

6.5 Management of performance

The management of IDT performance was discussed with district-based staff and managers within Jobcentres at both stages of the study. As discussed in Section 3.2.7 there was a general view, particularly in Stage One, that the operational requirements of the new target were not clear until after the target had been introduced. This was accompanied by a degree of uncertainty about how the target was being measured and what operational issues would have an impact on performance.

These initial concerns were addressed by a range of performance improvement activities and staff described numerous examples of work in which they had

been involved related to IDT performance. It was clear, however, that early poor performance was a concern for some districts and during Stage Two staff in underperforming districts relayed a sense of the need to over-perform in order to hit the target across the year. This drive to compensate for early poor performance may be related to some of the more radical measures found during Stage Two, such as cutting interviews times (see Section 6.4.1) and the reluctance to waive or defer customer interviews described in Section 6.2.3.

The availability of management information to facilitate the process of managing performance against the target was also a key issue for a number of staff. They highlighted the range of performance data available to them and were generally positive about that which was related to the IB element of the IDT, although there were some concerns around the lone parent and JSA IDT management information.

6.5.1 Performance improvement

During both stages of the study, CSD staff from across all districts described a variety of performance improvement events and activities which they had been involved with. In the majority of cases these activities were arranged by the performance teams at district level.

Many staff described conferences and workshops which had been organised specifically to look at the IDT-related activities of Jobcentre staff in their particular role. Staff were generally positive about these activities, which they described as offering an opportunity to speak with other staff working in the same role, to share concerns and more importantly, to share good practice across Jobcentres.

Staff in district performance teams also described how their teams had been structured around team members who specialised in the IB, lone parent and JSA elements of IDT performance. Although by Stage Two of the study a decision had been made to develop multi-functioning staff in many Jobcentres, district staff commented that specialising in certain areas was the most efficient way to operate. They highlighted the need for staff to have an in-depth knowledge of their particular customer group to ensure performance could be managed and improved effectively.

'Particularly the IB and the lone parent, it's very complex what the Adviser has to do to make sure their actions are correctly recorded, both in terms of the timescales that they need to do things and...getting markers right. It's almost impossible to know it all well. I have found having specialists works well because they become experts in that subject.'

(District Performance Manager, Stage Two)

During Stage One there was evidence of Jobcentre staff blaming staff errors within Contact Centres or delays in benefit processing for poor IDT performance. As described in Section 3.3.1, this was much less common during Stage Two and a number of staff referred to the District Operational Delivery Networks

which involved all three operational divisions as offering a route for performance improvement via the resolution of difficulties where these arose. In addition to these networks, staff also referred to the process of staff 'shadowing' to promote the understanding of each other's roles and develop direct links which were then used to address any operational difficulties and improve performance.

6.5.2 Performance data

Managers were positive about the IB performance data that was available to them. They described the significant amount of management information on the IB element of the IDT, which meant that performance could be managed in a timely fashion, identifying and solving problems almost as soon as they become apparent.

There were concerns, however, over the timeliness of lone parent data, due to a three-month delay in the availability of this data which limited its usefulness in managing and improving performance. In particular, managers pointed out the difficulties associated with addressing issues which had been problematic three months previously.

'That has been my main criticism...if you are doing something you need to be able to see how you are doing, so that you can take corrective action...if things do drift on...all of a sudden it does become a big issue where we are not performing well and it could be so easily corrected if everybody was on the ball all the time.'

This manager continued by adding that being in possession of timely data was useful not only in addressing deficiencies but in encouraging staff when they are performing well.

'Just a bit of praise, knowing you are doing well breeds success...people feel comfortable thinking...we are doing a good job here, and feel well respected and appreciated.'

(Advisory Service Manager, Stage Two)

The validity of JSA performance data was questioned by some staff, who expressed concerns over the reliability of the sampling method used. In particular, staff were critical of the sample size as they regarded it as too small to be reliable at local site level, although some did acknowledge that the sampling was actually designed to be valid at district level. They commented that it was difficult to use this data at Jobcentre level to manage and improve performance (see Section 4.3.5).

6.5.3 Policy intent vs. hitting the target

During Stage One staff described the difficulties arising from markers being set incorrectly within electronic customer records (discussed in Section 5.2.1). They explained that resetting these markers to correct any errors also restarts the clock on the automated process by which IDT performance is measured. Jobcentre staff were then placed in the position of having to decide if they should attempt to

organise the WFI to meet the policy intent of the target, i.e. see an IB customer after the end of the eighth week and up to the end of the 13th week of the claim or schedule the WFI to ensure the timing meets the requirements of the measurement process on which IDT performance is based. Towards the end of Stage One, guidance was issued which clarified this situation in that staff should aim to hit the policy intent for the intervention timing, rather than have practice distorted by the target measurement process.

In Stage Two there was, however, evidence in one district that staff were being advised to meet the IDT target measurement requirement ahead of the policy intent. The District Manager commented that performance was judged on whether they hit the target or not and that staff would, therefore, be encouraged to hit the target rather than meet the policy intent.

'To be honest as a District Manager I would be advising them [Jobcentre staff] to hit the target...if I had to choose it would be the target, because that is what I am judged on and what I don't want to do is spend a lot of time explaining why we didn't hit the target but met the policy intent.'

(District Manager, Stage Two)

6.6 Conclusions

In working with the IDT, Jobcentre staff had identified a range of issues which have an impact upon their ability to meet the target requirements. Customers failing to attend interviews and the availability of Advisers to carry out interviews were seen as the main potential constraints on performance.

To address these issues a number of processes had been adopted within Jobcentres. With regards to minimising failures to attend, the use of pre-calls was seen to be effective, although there were concerns about the levels of resource this involved. This concern was linked to a general reservation articulated by a number of senior staff about process taking precedence over outcome. They noted the significant resource being allocated to support the IDT without clear evidence that this would be reflected in improved job outcomes.

The need to closely manage Advisers' diaries was a key lesson learned as staff became familiar with the IDT and during the course of the study Jobcentres also appeared to be moving towards a flexible or multi-functional approach for key staff such as DASOs and Advisers. These staff no longer specialised in working with JSA, lone parent or IB customers and instead, worked across all customer groups, although there were some concerns that this approach could dilute specialist skills and knowledge.

Whilst staff acknowledged that IDT was not a quality measure, they expressed some reservations about the potentially negative impact a process-related target can have upon quality. There were suggestions that the quality of interventions may suffer as more attention was diverted towards managing the IDT processes

and this was supported by evidence of interviews being shortened during Stage Two of the study.

As a support for the management of performance staff were positive about the IB information that was available to them, although there were some issues with the timeliness of lone parent data and the sampling for JSA checks, which made it difficult to address and improve performance issues within Jobcentres.

Overall in working with the IDT Jobcentre staff had adopted various practices for ensuring that the target could be achieved, although in doing this there were a number of emerging concerns over the impact on the quality of interventions and the focus on processes rather than the job outcomes.

7 Conclusions

7.1 Staff awareness and understanding of the Interventional Delivery Target

The initial element of the staff interviews carried out during both stages of the IDT review aimed to assess whether staff had an understanding of the target and how they as individuals contributed towards it. During Stage One, staff awareness of the structure and purpose of the IDT was variable, with DASOs, Advisers and managerial staff generally demonstrating a good level of knowledge. The staff in BDCs and Contact Centres (Benefit Processors and FCOs) often had a much more limited understanding. Although this general pattern was broadly similar during Stage Two, there were improvements in awareness within both Jobcentres and Contact Centres.

When staff were asked how and when they received information about the new target a number of issues were raised regarding the communications process related to the implementation of the new target. In general there was a sense that the information and guidance staff required for successful early implementation was not always readily available or produced in the most appropriate format.

7.1.1 Investment in new target launch activities

There was evidence of a considerable degree of performance improvement activity shortly after the implementation of the IDT. This, along with the staff views of the shortcomings in the communications process, suggest that an increased investment in launch activities would have been useful. In the longer-term, such an approach may prove to be more cost effective than reactive performance improvement activity shortly after implementation.

It is, therefore, recommended that the following general issues be considered prior to the introduction of new organisational targets:

- the need for the timely delivery of clear and comprehensive guidance;
- the need for information tailored to the specific needs of staff groups;

- the need to use effective delivery methods, i.e. face to face to highlight important new issues, with electronic and/or paper-based media to provide supporting reference material

7.1.2 Coordination across operational areas

The IDT is predicated on delivery across three operational areas of Jobcentre Plus: Contact Centres, BDCs and Jobcentres, and underlying a number of the operational difficulties related to the new target there was some sense of divisions between these operational areas. Although this was not universal, with many staff referring to effective District Operational Delivery Networks, such tensions may highlight a need for improved coordination and cooperation.

As well as the work of the District Operational Delivery Networks, a number of staff described the value of visiting and '*shadowing*' staff in other parts of the organisation as a way of promoting cooperative working. The development of such initiatives may be helpful in supporting the effective delivery of cross-organisational working and any related performance targets. It may also foster a shared ownership of such targets and support a process which ensures the appropriate degree of operational input required to produce tailored guidance for all staff groups.

7.2 Working with the Interventional Delivery Target

7.2.1 Jobcentres

In working with the IDT, Jobcentre staff identified a range of issues which have an impact upon their ability to meet the target requirements. Customers failing to attend interviews and the availability of Advisers to carry out interviews were seen as the main potential constraints on performance.

To address these issues a number of processes had been adopted within Jobcentres. With regards to minimising failures to attend, the use of pre-calls was seen to be effective, although there were concerns about the levels of resource this involved. This concern was linked to a general reservation articulated by a number of senior staff about IDT processes taking precedence over outcomes. They noted the significant resource being allocated to support the IDT without clear evidence that this would be reflected in improved job outcomes.

The need for close management of Advisers' diaries was a key lesson learned as Jobcentre staff became familiar with the IDT and during the course of the study Jobcentres also appeared to be moving towards a flexible or multi-functional approach for key staff such as DASOs and Advisers. These staff no longer specialised in working with JSA, lone parent or IB customers and instead, worked across all customer groups, although there were some concerns that this approach could dilute specialist skills and knowledge.

Whilst staff acknowledged that the IDT was not a quality measure, they expressed some reservations about the potentially negative impact a process-related target can have upon quality. There were suggestions that the quality of interventions might suffer as more attention was diverted towards managing the IDT processes and this was supported by some evidence of interviews being shortened during Stage Two of the study.

Staff were positive about the IB information that was available to them as a support for the management of performance, although there were some issues with the timeliness of lone parent data and the sampling of JSA checks. They described these issues as limiting the usefulness of the data for managing and improving performance within Jobcentres.

Overall, in working with the IDT Jobcentre staff had adopted various practices for ensuring that the target could be achieved, with those described as most effective being:

- interview pre-calls;
- close management of adviser diaries;
- development of multi-functional staff.

There were, however, a number of emerging concerns over the impact of these practices on the quality of interventions and the focus on processes rather than the job outcomes.

7.2.2 Contact Centres and BDCs

A number of operational issues were identified which have an impact upon Contact Centre and BDC performance, in particular with relation to the IB element of the IDT. These issues were often related to shortcomings in the IT systems used by staff, which many regarded as unsupportive of current operational practice. Difficulties were exacerbated by low levels of staff awareness of the operational requirements associated with the introduction of the IDT and a general perception that the IDT was a 'Jobcentre target'. Staff within Contact Centres and BDCs identified a clear need for the provision of information and guidance on the IDT which was tailored to their specific roles.

Within Contact Centres the deficiencies of the IT systems being used greatly complicated the role of the FCO and it is perhaps unsurprising that errors occurred in areas such as setting JP Markers. Given the complexity of the systems used by FCOs, the omission of basic level IT skills as an essential requirement when recruiting staff to this role should perhaps be reviewed.

The IT system used to process IB claims within BDCs also appears to have significant limitations, in particular with regard to the links to other Jobcentre Plus customer management systems. Staff suggest that delays in the processing of claims are, however, largely related to gathering relevant supporting information from customers. Some review of how the FCO informs customers of what is required to

support claims and the checks carried out by financial assessors prior to submitting claims to the BDC, may therefore, be helpful.

Overall, despite the issues described already, it is clear that once operational requirements related to the IDT were apparent to staff, performance improvement activities were undertaken to address specific difficulties. Within Contact Centres and BDCs it would appear that these operational requirements were not identified until some time after the implementation of the target. When introducing new targets it might be helpful for each operational area to identify potential performance constraints and contribute to the development of appropriate staff guidance prior to implementation.

It is recommended that some of the specific difficulties highlighted by staff may require further review in particular with regard to ensuring:

- IT systems support current operational practice;
- the recruitment of FCOs with appropriate IT skills;
- the information required to support IB claims is clearly communicated and the role carried out by the financial assessors confirmed.

7.3 Staff perceptions of the Interventional Delivery Target

7.3.1 The IDT and customer service

There was a strong view amongst many staff that the IDT supported good customer service, by ensuring that customers are offered the advice and support which will assist them to find work. This view was the basis of the positive staff perceptions of the IDT which were found across both stages of the study. In addition to this, many staff also identified the target focus on IB and lone parent customers as an important development. There was a general perception that these customers had previously received insufficient attention and many would be able to find work with the right levels of support from Jobcentre Plus.

When staff discussed how interventions help people into work, some also described the importance of employment as a way of helping disadvantaged people out of poverty. Many staff clearly valued the role that Jobcentre Plus plays in helping disadvantaged people to improve their situation via work and were committed to their part in that role.

It should, however, be noted that some emerging working practices associated with the drive to meet IDT performance levels could potentially have a detrimental effect on customer service. For example, there did appear to be a growing reluctance amongst staff to use the option to waive or defer customer interviews and in one district, customer interviews were being shortened. Another area where staff raised concerns about service quality emerged during Stage Two and related to

Jobcentres implementing the model of flexible or multi-functional Advisers. These Advisers no longer specialised in working with JSA, lone parent or IB customers, and instead worked across all customer groups. There was a suggestion from some staff that this approach could dilute specialist skills and knowledge, although they offered no direct evidence that this was the case.

In order to assess the validity of the concerns highlighted above it may be helpful to review any evidence of:

- changes in the use of interview waivers and deferrals;
- the impact of multi-functional staff on the quality of service offered to lone parent and IB customers.

7.3.2 The IDT and JOT – monitor the emerging picture

Staff, and in particular managers, were more ambivalent towards the new target in relation to the links between the IDT and JOT. There was a view that as the IDT helps to ensure that customers attend WFIs this must have a positive impact upon job outcomes. However, staff were not able to offer evidence of a positive correlation between performance against the two targets, indeed a number of areas with good IDT performance indicated that they performed poorly against JOT. Staff offered a number of explanations for this, most commonly raising questions about the configuration of JOT, rather than about the value of the interventions monitored by the IDT.

There was a suggestion that JOT performance targets were unrealistic, and that not all relevant job outcomes are recorded. Some staff suggested that when customers from the lone parent and IB groups move into employment they are often employed part-time and so this may not be recorded as a job outcome as the employer is not obliged to inform HMRC (via a P45/46) until an employee reaches the income tax threshold. Staff also suggested that because of the long-term nature of the work, many lone parent and IB customer interventions undertaken since the introduction of the IDT would not yet be reflected in job outcomes.

With the delays inherent in the production of JOT data it will be some time before the impact of the IDT upon JOT is clear. This lack of clear evidence of any positive impact of the IDT in terms of job outcomes was an increasing concern with a number of managers, most notably during Stage Two of the study.

It is recommended that the relationship between IDT performance and job outcomes should be monitored over time to provide the evidence required to accurately assess the impact of the new target on JOT performance.

7.3.3 The IDT – ‘process over outcome’ and ‘quantity versus quality’

As staff within Jobcentres developed their working practices to support IDT performance (discussed in Section 7.2), a number of senior staff began to articulate a general concern that ‘process’ was taking precedence over ‘outcome’. They

noted that significant resources were being allocated to support IDT performance without clear evidence this that would be reflected in improved job outcomes.

In addition to this a number of staff also expressed some reservations about the potentially negative impact a process-related target can have upon quality. Whilst they acknowledged that the IDT was not intended as a measure of quality there were suggestions that the quality of interventions might suffer as more attention and resource was diverted towards managing the IDT processes. Whilst this was commonly raised during Stage One of the study, no direct evidence of any negative impact was found.

There was, however, some evidence of customer interviews in one district being shortened during Stage Two and it will be important for Jobcentre Plus to monitor and address any similar action which may compromise the effectiveness of interventions. Although it should be noted that, significantly, the district where this practice emerged had demonstrated early poor performance against the target and staff relayed a sense of needing to 'over-perform' in order to meet the target across the year.

As mentioned above, some staff also expressed reservations about the move towards multi-functional Advisers. Managers described this development as necessary to ensure the requirements of the IDT could be met, although it was also suggested that the approach could have a negative impact on the quality of service delivered due to the dilution of specialist skills and knowledge. Further review may be required to properly assess the impact of multi-functional staff on the quality of service offered to lone parent and IB customers.

Appendix A

Topic guides

1. IDT Managers Topic Guide – Stage One

In April this year Jobcentre Plus introduced the IDT – we'd like to ask you about this new target.

A. Background (keep section short)

- 1 What is your job role?
- 1a How long have you been in this role?

B. Understanding of IDT structure and purpose

Their general grasp of purpose of IDT and how they as individuals and their staff contribute to it

- 1 Do you understand the purpose of IDT?
- 2 Why is the target as a whole important to Jobcentre Plus?
- 3 Why have the 4 elements have been included?
 - Why is each of these elements important to Jobcentre Plus?
- 4 What are the impacts of not meeting the target? (i.e. not carrying out interventions on time)
- 5 What is required from staff in order to meet the target?

Prompt:

- What must happen overall to meet the target?
- What must happen with each element/type of intervention?

6 Do you think staff understand why IDT is important to Jobcentre Plus?

Prompt:

- Do you think staff understand why each of the elements have been included in the target?
- Do staff understand what is required from the in order for Jobcentre Plus to meet the target?

7 Does IDT support/help customers in their contact with Jobcentre Plus?

Prompt:

- How does it help/support
- If it doesn't help – why not? How does it hinder?

C. Communication/Roll out of IDT

Gain an insight into how the change to IDT affected individuals, whether the change was smooth and whether guidance was appropriate

1 How did you find out about the introduction of IDT?

Prompt:

- What format was this communication?
- How effective was this format?
- When did you receive the information/guidance?
- Was this the most useful time to receive the info?

2 Did the information/guidance you received about the IDT clearly explain the target?

Prompt:

- Was the guidance easily visible/accessible? (i.e. easy to find/access)

3 Did the information/guidance clearly explain how the target is linked to the work you and your staff carry out?

4 When did staff receive guidance about IDT?

Prompt:

- Was this at the right time?
- Was guidance for staff easily visible/accessible? (i.e. easy to find/access)

5 How were your staff informed about IDT?

Prompt:

- Did you communicate information about the new target to staff? (ie was it the managers responsibility?)
- Were there any specific events to launch IDT?

6 Were you able to brief staff/answer questions about IDT from the guidance you received?

7 How well was the target implemented?

Prompt:

- What was done well?
- What could be improved?

8 Was the roll out of IDT smooth or were there any teething problems?

Prompt:

- In your opinion have these had an impact on performance?

9 *Is there anything which could be learnt from the introduction of IDT for whenever a new target is introduced?*

D. Working with IDT

Find out whether staff are working differently under IDT. Are they deploying resources or managing staff differently? If so, do they understand why?

1 Thinking about the role of your staff within Jobcentre Plus can you tell me how their work, relates to the achievement of the IDT?

Prompt:

- Do their roles relate to the target as a whole, or specific elements of the target?

2 Are there any issues which prevent your staff achieving the target?

3 Have you made any changes to the way your staff work or the way resources are deployed due to the introduction of IDT?

Prompt:

- Probe resource issues
- Do staff have to perform tasks outside their remit in order to meet the target?

Adviser Managers

- Are advisers carrying out more customer interviews to meet the target?
- If yes – how are you able to do this?
- If yes – what impact does this have on the service offered to customers? (*probe re: quality issues if interviews are shortened*)

Benefit Processing

- Do you think staff aware of the impact that benefit processing can have on whether Jobcentre Plus meets the IB element of IDT?
- Are staff aware of the importance of need for benefit to be assessed by end of 6th week/18 day target for processing IB claim/impact on IDT if this target is not met?
- Any issues re: receipt of information to facilitate processing claims within target period?
- How do you communicate these issues to staff?

CETL

- Do DASOs need to book in more customer interviews to meet the target?
- Any issues re: adviser availability?
- Any issues re: IB having been assessed by the 6 week point
- Any issues re: timing of appointments for LP & IB customers? (i.e. before start of measurement period)
- Do you think DASOs understand the impact that they can have on meeting individual elements of IDT?

Contact Centre

- Are First Contact Officers aware of importance of selecting correct customer type/and ensuring customers allocated to correct Jobcentre/adviser for IB customers?
- How is this communicated to staff?
- Do you carry out any checks/follow up re: customer review schedules arriving at the call centre? (if customer not allocated to Jobcentre advisor)

Customer Service Ops Managers

- Do you need to deploy more advisors to carry out interviews? (*probe re: staff performing tasks outside their roles, potential deficit for other functions*)

Jobcentre Managers

- Do FJR's need to book in more customer interviews to meet the target?
 - Are they able to book more interviews in if necessary?
 - Any issues re: adviser availability?
 - Do you think FJR's understand the impact the can have on meeting the JSA and LMI elements of the target?
 - Any issues re: using LMS hotspots to identify customers due an interview?

- 4 Have there been any changes in staff behaviour for you to manage as a result of IDT?
 - Do you anticipate the need to manage any further behaviour changes?
- 5 How do you manage staff performance following the introduction of IDT?
 - What has been the impact on managing staff in general?
 - What has been the impact on managing individuals?
- 6 Do you manage the target as a whole or each element individually?
- 7 Is this different to the way performance was managed when the measures were KMIs?
 - Is there a difference in how you allocate staff resource (since IDT became a target)?
- 8 Do you feel it was useful to have had these measures in place as KMIs prior to their introduction as a target?
- 9 Do you work with other parts of Jobcentre Plus to achieve IDT performance?
 - If yes – is performance on IDT dependant on these other parts of the organisation?
 - Are there factors beyond your control that affect IDT performance?
- 10 What works well within IDT?
Prompt: (for Jobcentre based staff only)
 - Has IDT improved compliance with timings for interventions?

E. How IDT fits in and supports other Jobcentre Plus targets

Find out whether people understand how IDT contributes/links to other targets. Do people understand how their part fits in overall?

- 1 Does IDT support other targets such as JOT?
 - If no – what are the difficulties/barriers?
 - If yes - how does it do this?
 - Does IDT align with other targets?
 - How? What could be improved?
- 2 How important is performance on the target compared to the other targets?
- 3 Do you feel it is possible to successfully manage IDT performance alongside other Jobcentre Plus targets?

Prompt:

- Can IDT and JOT be successfully managed together?

F. Management Information/Tools

- 1 What IDT related MI is available to you (at local/district/regional/national level)?
- 2 How useful/appropriate and timely is this MI?

Prompt:

- Have you had any feedback on IDT performance so far?
 - Can/Have you used the MI to manage the performance of your staff?
 - Is MI for each element of IDT equally useful?
- 3 Does the MI enable you to monitor performance on all elements of IDT? (i.e. the impact of contact centres and BPCs)
 - 4 How useful are the IDT products/tools?
 - Are they appropriate for staff?
 - Do they give staff enough information?
 - 5 Do IT systems affect the delivery of IDT?
 - Any specific difficulties/how they hinder performance?
 - Any areas where IT is supportive?

G. Does IDT measure the right things and are there areas for improvement?

Overall, what are opinions on IDT and individual contributions, and what is good/bad with it?

- 1 Are the four elements which make up IDT the most important interventions to measure?
- 2 What are your views on the levels set within IDT?
- 3 Do you think anything else should be measured in the target?
- 4 Is anything further required for staff to understand:
 - How to deliver the target?
 - Improve compliance with the process (i.e. deliver the interventions on time)?
- 5 Overall what do you see are the
 - positive aspects of the target and/or
 - difficulties associated with the target?

2. IDT Advisers Topic Guide – Stage One

In April this year Jobcentre Plus introduced the IDT – we'd like to ask you about this new target.

A. Background

1 What is your job role?

1a How long have you been working within Jobcentre Plus/this role?

B. Understanding IDT structure and Purpose

Do individuals have a general grasp of purpose of IDT and how they as individuals contribute to it

1 Do you know what the IDT is?

Probe: about knowledge of different elements

Probe: why they think it has been introduced

2 Thinking about your job, how do you contribute to the IDT?

3 Do you know what is required to meet the target?

Prompt:

- What must happen overall to meet the target?
- What must happen with element their work relates to?

4 Why do you think the part your work is related to is included in the IDT?

C. Communication/Roll out of IDT

To gain an insight into how the change to IDT affected individuals, whether the change was smooth and whether guidance was given properly by managers

1 How did you find out about the introduction of IDT?

- How was it communicated to you?
- How effective was this format?

2 When did you receive the information/guidance?

- Was this the most useful time to receive the info?
- Who did you receive it from?

3 Did the information/guidance you received about the IDT clearly explain the target?

- Was the guidance easily visible/accessible? (i.e. easy to find/access)

4 Did the information/guidance clearly explain how the target is linked to the work you carry out?

- 5 Is there anything which you feel could be learnt from the introduction of IDT for when new targets are introduced in future?

D. Working with IDT

To find out whether people are working differently under IDT. Are they doing more of a certain type of intervention or being managed differently? If so, do they understand why?

- 1 Is achieving good performance on IDT an important part of your role?

Prompt:

- How much of your role is dedicated to achieving performance on IDT?
 - Has your manager highlighted the importance of achieving the required IDT performance level?
 - If yes is there a focus on elements of IDT or IDT performance as a whole?
- 2 Have any changes been made to the way you work because of the introduction of IDT?

Jobcentre staff only

Probe: Changes in quality v quantity, are advisors doing more interventions more quickly?

- 3 Do you understand why these changes have been made?
- 4 Are there any issues you face in achieving the target?

Benefit Processor

- Aware of importance of need for benefit to be assessed by end of 6th week/18 day target for processing IB claim/impact on IDT if this target is not met?
- Any issues re: receipt of information to facilitate processing claims within target period?
- If aware of these issues, how were they communicated to you?
- Any issues re: IT systems you use?

DASO

- Do you need to book in more customer interviews to meet the target?
- Any issues re: Adviser availability?
- Any issues re: IB having been assessed by the 6 week point
- Any issues re: timing of appointments for LP & IB customers? (i.e. before start of measurement period)
- Any issues re: reports received on a weekly basis to book customer interviews
- Any issues re: IT systems you use?

FCO

- Aware of importance of selecting correct customer type/and ensuring customers allocated to correct Jobcentre/Adviser for IB customers?
- If aware of these issues, how were they communicated to you?
- Any issues re: IT systems you use?

FJR

- Do you need to book in more customer interviews to meet the target?
- Any issues re: Adviser availability?
- Any issues re: using LMS hotspots to identify customers due an interview?
- Any issues re: IT systems you use?

IBPA

- Do you need to carry out more customer interviews to meet the target?
- If yes – how do you do this? do you need to shorten interviews? (**probe** re: quality issues if interviews are shortened)
- Any issues re: IT systems you use?

PA

- If yes – how do you do this? do you need to shorten interviews? (**probe** re: quality issues if interviews are shortened)
- Do you need to carry out more customer interviews to meet the target?
- Any issues re: IT systems you use?

5 Have you had to perform any tasks outside your role in order to meet IDT?

6 Have there been any changes in the way you are managed as a result of IDT?

7 Have you had any feedback on IDT performance so far?

8 Do you work with other parts of Jobcentre Plus to achieve IDT performance?

Prompt:

- If yes – is performance on IDT dependant on these other parts of the organisation?

9 Are there factors beyond your control that affect IDT performance?

- If so, how do they affect performance

E. How IDT fits in and supports other Jobcentre Plus targets

To find out whether people understand how IDT contributes/links to other targets. Do people understand how their part fits in overall?

- 1 Thinking of what you need to do to meet IDT, does this support what you have to do to meet other targets?
 - If yes – how does it do this?
 - If no – what are the difficulties/barriers?
- 2 Does IDT support what you need to do under JOT? (i.e. does IDT help support the aim of moving people into work?)
 - If yes – how does it do this?
 - If no – what are the difficulties/barriers?
3. Does IDT support/help customers in their contact with Jobcentre Plus?

F. Does IDT measure the right things and are there areas for improvement?

Overall, what are opinions on IDT and individual contributions, and what is good/bad with it?

- 1 Is the part of IDT that you contribute to an important intervention to help you get people into work?
- 2 Is the level set for your element achievable?
 - If not, why not?
 - If so, is it stretching?
- 3 Do you think anything else that you do should be measured in the target?
- 4 Overall what do you see are the:
 - positive aspects of the target and/or
 - difficulties associated with the target?
 - things which could be improved with the target
- 5 Taking all things into consideration, do you understand the target as a whole and how it links into the overall work of Jobcentre Plus?

3. IDT Managers Topic Guide – Stage Two

A. Background (keep section short)

- 1 What is your job role?
- 1a How long have you been in this role?

B. Understanding of IDT structure and purpose

Their general grasp of purpose of IDT and how they as individuals and their staff contribute to it

- 1 Do you understand the purpose of IDT?
- 2 Why is the target as a whole important to Jobcentre Plus?
- 3 Why have the 4 elements have been included?
 - Why is each of these elements important to Jobcentre Plus?
 - Has IDT led to improvements in interventions for priority customers? (i.e more IB customers in for interventions)
- 4 What are the impacts of not meeting the target? (i.e. not carrying out interventions on time)
- 5 What is required from staff in order to meet the target?

Prompt:

- What must happen overall to meet the target?
 - What must happen with each element/type of intervention?
- 6 Do you think staff understand why IDT is important to Jobcentre Plus?

Prompt:

- Do you think staff understand why each of the elements have been included in the target?
 - Do staff understand what is required from the in order for Jobcentre Plus to meet the target?
- 7 Has staff understanding/awareness of IDT changed over time?
 - 8 Does IDT support/help customers in their contact with Jobcentre Plus?

Prompt:

- How does it help/support
- If it doesn't help – why not? How does it hinder?
- Overall, has it improved the customer experience?

C. Communication/Roll out of IDT

Gain an insight into how the change to IDT affected individuals, whether the change was smooth and whether guidance was appropriate

- 1 Have you had any more information about IDT since its introduction?
 - How was it communicated to you?
 - How effective was this format?
 - If not did you want any further information?
- 2 Did the information/guidance you received about the IDT clearly explain the target?

Prompt:

- Was the guidance easily visible/accessible? (i.e. easy to find/access)
- 3 Did the information/guidance clearly explain how the target is linked to the work you and your staff carry out?
 - 4 When did staff receive guidance about IDT?

Prompt:

- Was this at the right time?
 - Was guidance for staff easily visible/accessible? (i.e. easy to find/access)
- 5 How were your staff informed about IDT?

Prompt:

- Did you communicate information about the new target to staff? (ie was it the managers responsibility?)
 - Were there any specific events to launch IDT?
- 6 Were you able to brief staff/answer questions about IDT from the guidance you received?
 - 7 How well was the target implemented?

Prompt:

- What was done well?
 - What could be improved?
- 8 Was the roll out of IDT smooth or were there any teething problems?

Prompt:

- In your opinion have these had an impact on performance?
- 10 *Is there anything which could be learnt from the introduction of IDT for whenever a new target is introduced?***

11 In your opinion, would you say IDT is fully bedded in now?

- *Why?*

D. Working with IDT

Find out whether staff are working differently under IDT. Are they deploying resources or managing staff differently? If so, do they understand why?

- 1 Thinking about the role of your staff within Jobcentre Plus can you tell me how their work, relates to the achievement of the IDT?

Prompt:

- Do their roles relate to the target as a whole, or specific elements of the target?
- Has this changed over time?

- 2 Are there any issues which prevent your staff achieving the target?

Prompt:

- Is flexibility of staff resource an issue? (i.e. local flexibility issues)
- Are there any problems that have occurred over time related to IDT?
- How have these been resolved?

- 3 Have you made any changes to the way your staff work or the way resources are deployed due to the introduction of IDT?

- Probe resource issues
- Do staff have to perform tasks outside their remit in order to meet the target?
- Has this changed as IDT has progressed since April 2007?
- Have you learnt any key lessons to meet IDT performance as you have worked with the target?

Customer Service Ops Managers

- Do you need to deploy more advisors to carry out interviews? (*probe re: staff performing tasks outside their roles, potential deficit for other functions*)
- Has this changed as IDT has bedded in?

- 4 How effectively is adviser time used with Fail To Attends?

- What tasks can/do adviser undertake in this time?

- 5 Have there been any changes in staff behaviour for you to manage as a result of IDT?

- Is IDT driving the correct behaviours?
- Do you anticipate the need to manage any further behaviour changes?

- 6 How do you manage staff performance following the introduction of IDT?
 - What has been the impact on managing staff in general?
 - What has been the impact on managing individuals?
 - Do you think staff are under pressure to carry out interventions?
- 7 Do you manage the target as a whole or each element individually?
 - Do you/can you use AAT to help manage IDT?
 - Does AAT have an impact on IDT performance?
 - In what way?
 - Does AAT and IDT work well together?
 - If not, why not?
 - If yes, in what way?
- 8 Is this different to the way performance was managed when the measures were KMIs?
 - Is there a difference in how you allocate staff resource (since IDT became a target)?
- 9 Do you feel it was useful to have had these measures in place as KMIs prior to their introduction as a target?
- 10 Do you work with other parts of Jobcentre Plus to achieve IDT performance?
 - If yes – is performance on IDT dependant on these other parts of the organisation?
 - Are there factors beyond your control that affect IDT performance?
- 11 What works well within IDT?

Prompt: (for Jobcentre based staff only)

 - Has IDT improved compliance with timings for interventions?

E. How IDT fits in and supports other Jobcentre Plus targets

Find out whether people understand how IDT contributes/links to other targets. Do people understand how their part fits in overall?

- 1 Does IDT support other targets such as JOT?
 - Has the introduction of IDT had a detrimental effect on JOT? (probe for evidence to support views?)
 - If no – what are the difficulties/barriers?
 - If yes – how does it do this?
 - Does IDT align with other targets?
 - How? What could be improved?

- 2 Has the quality of interventions changed since the introduction of IDT?
Probe: (quality vs. quantity issues)
 - Is there any evidence to support views?
- 3 How important is performance on the target compared to the other targets?
- 4 Do you feel it is possible to successfully manage IDT performance alongside other Jobcentre Plus targets?
 - Can IDT and JOT be successfully managed together?
- 5 Have there been any problems with other aspects of Jobcentre Plus which hinder meeting the target?

F. Management Information/Tools

- 1 What IDT related MI is available to you (at local/district/regional/national level)?
- 2 How useful/appropriate and timely is this MI?
Prompt:
 - Have you had any feedback on IDT performance so far?
 - Can/Have you used the MI to manage the performance of your staff?
 - Is MI for each element of IDT equally useful?
- 3 Does the MI enable you to monitor performance on all elements of IDT? (i.e. the impact of contact centres and BPCs)
- 4 What new products are available in relation to IDT?
Prompt:
 - How useful are the IDT products/tools?
 - Are they appropriate for staff?
 - Do they give staff enough information?
- 5 Do IT systems affect the delivery of IDT?
 - Any specific difficulties/how they hinder performance?
 - Any areas where IT is supportive?

G. Does IDT measure the right things and are there areas for improvement?

Overall, what are opinions on IDT and individual contributions, and what is good/bad with it?

- 1 Are the four elements which make up IDT the most important interventions to measure?
- 2 What are your views on the levels set within IDT?
- 3 Do you perceive that interventions are carried out at the right time?
- 4 Do you think anything else should be measured in the target?
- 5 Is anything further required for staff to understand:
 - How to deliver the target?
 - Improve compliance with the process (i.e. deliver the interventions on time)?
- 6 Overall how well do you think the target is working 6/7 months after its introductions?
 - what are the positive aspects of the target?
 - difficulties associated with the target?

4. IDT Advisers Topic Guide – Stage Two

In April this year Jobcentre Plus introduced the IDT – we'd like to ask you about this new target.

A. Background:

- 1 What is your job role?
- 1a Have long have you been working within Jobcentre Plus/this role?

B. Understanding IDT structure and Purpose

Do individuals have a general grasp of purpose of IDT and how they as individuals contribute to it

- 1 Do you know what the IDT is?
Probe: about knowledge of different elements
Probe: why they think it has been introduced
- 2 Has your knowledge of IDT improved since its introduction?
- 3 Thinking about your job, how do you contribute to the IDT?
- 4 Do you know what is required to meet the target?
Prompt:
 - What must happen overall to meet the target?
 - What must happen with element their work relates to?
 - Do you feel under pressure to carry out interventions on time?
- 5 Why do you think the part your work is related to is included in the IDT?

C. Communication/Roll out of IDT

To gain an insight into how the change to IDT affected individuals, whether the change was smooth and whether guidance was given properly by managers

- 1 Have you had any more information about IDT since its introduction?
 - How was it communicated to you?
 - How effective was this format?
 - If not did you want any further information?
- 2 When did you receive the information/guidance?
 - Was this the most useful time to receive the info?
 - Who did you receive it from?

- 3 Did the information/guidance you received about the IDT clearly explain the target?
 - Was the guidance easily visible/accessible? (i.e. easy to find/access)
- 4 Did the information/guidance clearly explain how the target is linked to the work you carry out?
- 5 Is there anything which you feel could be learnt from the introduction of IDT for when new targets are introduced in future?

D. Working with IDT

To find out whether people are working differently under IDT. Are they doing more of a certain type of intervention or being managed differently? If so, do they understand why?

- 1 Is achieving good performance on IDT an important part of your role?

Prompt:

- How much of your role is dedicated to achieving performance on IDT?
 - Has your manager highlighted the importance of achieving the required IDT performance level?
 - If a customer is not interviewed within the target period, do you prioritise seeing that customer as soon as possible?
 - Is this customer less of a priority as window has been missed?
 - If yes is there a focus on elements of IDT or IDT performance as a whole?
- 2 How do you spend your time when a FTA takes place?
 - What tasks can/do you do in this time?
 - 3 Have any changes been made to the way you work because of the introduction of IDT?

Probe: Changes in quality v quantity, are they doing more interventions quicker?

Probe: Has the quality of interventions changed since the introduction of IDT?
 - 4 Do you understand why these changes have been made?
 - 5 Are there any issues you face in achieving the target?
 - If yes – how do you do this? do you need to shorten interviews?

(**probe** re: quality issues if interviews are shortened, any evidence?)
 - Do you need to carry out more customer interviews to meet the target?
 - Any issues re: IT systems you use?

- Have any IDT issues been resolved?
 - How did this happen?
- 6 Have you had to perform any tasks outside your role in order to meet IDT?
- 7 Does AAT have any impact on your ability to meet IDT? i.e. are the benchmarks set for AAT the right ones to achieve IDT performance?
 - Yes in what way?
 - No – how does it hamper?
 - Do AAT and IDT help to ensure interventions are conducted on time?
- 8 Have there been any changes in the way you are managed as a result of IDT?
- 9 Have you had any feedback on IDT performance so far?
- 10 Do you work with other parts of Jobcentre Plus to achieve IDT performance?

Prompt:

- If yes – is performance on IDT dependant on these other parts of the organisation?
- 11 Are there factors beyond your control that affect IDT performance?
 - If so, how do they affect performance
 - 12 What new products are available to you in relation to IDT?

Prompt:

- How useful are the IDT products/tools? (E.g. process maps)

E. How IDT fits in and supports other Jobcentre Plus targets

To find out whether people understand how IDT contributes/links to other targets. Do people understand how their part fits in overall?

- 1 Thinking of what you need to do to meet IDT, does this support what you have to do to meet other targets?
 - If yes – how does it do this?
 - If no – what are the difficulties/barriers?
- 2 Does IDT support what you need to do under JOT? (i.e. does IDT help support the aim of moving people into work?)
 - If yes – how does it do this?
 - If no – what are the difficulties/barriers?
 - Has the introduction of IDT had a detrimental effect on JOT? (probe for evidence to support views)
- 3 Does IDT support/help customers in their contact with Jobcentre Plus?
 - Overall has IDT improved the customer experience?

F. Does IDT measure the right things and are there areas for improvement?

Overall, what are opinions on IDT and individual contributions, and what is good/bad with it?

- 1 Is the part of IDT that you contribute to an important intervention to help you get people into work?
- 2 Is the level set for your element achievable?
 - If not, why not?
 - If so, is it stretching?
- 3 Do you think anything else that you do should be measured in the target?
- 4 Do you think that interventions are carried out at the right time?
- 5 Overall what do you see are the:
 - positive aspects of the target and/or
 - difficulties associated with the target?
 - things which could be improved with the target
- 6 Taking all things into consideration, do you understand the target as a whole and how it links into the overall work of Jobcentre Plus?

Job Specific Prompts

Benefit Processing

- Aware of importance of 18 day target for processing IB claim/impact on IDT if this target is not met?
- Any issues re: receipt of information to facilitate processing claims within target period?

Contact Centre

- Aware of importance of selecting correct customer type/and ensuring customers allocated to correct Jobcentre/advisor for IB customers?

Appendix B

Staff interviews

Table B.1 Details of the numbers of staff interviewed

	Stage 1	Stage 2	Total
Contact Centres			
First Contact Officers	6	6	12
Team Leaders	2	2	4
Business Development/Performance Managers	3	2	5
Contact Centre Managers	1	2	3
Benefit Delivery Centres			
IB Processors	8	8	16
Team Leaders	2	1	3
IB Managers			
Benefit Delivery Centre Managers	2	2	4
Customer Service Directorate			
Fortnightly Jobsearch Reviewers	4	5	9
Advisers delivering the interventions regime	15	14	29
Advisory Service Managers	10	11	21
Diary/Admin Support Officers	9	9	18
Customer Engagement Team Leaders	9	10	19
Customer Services Operation Managers	5	4	9
Jobcentre Managers	5	4	9
District Managers	5	5	10
District Performance Managers	4	6	10
Regional Performance Managers	5	2	7
Regional Customer Service Director	1		1
Jobcentre Plus Head Office			
Performance Measurement and Analysis Division	2		2
Operational Performance Support	1		1
DWP – Welfare Work and Equality Group			
Delivery Strategy and Performance	1		1
Total number of interviews conducted	100	93	193

