

PRACTITIONER'S TOOLKIT TO ASSIST THE IMPLEMENTATION OF THE LTU RECOMMENDATION



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PRACTITIONER'S TOOLKIT
TO ASSIST
THE IMPLEMENTATION
OF THE LTU
RECOMMENDATION

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Introduction



What is the purpose of the toolkit?

This toolkit is intended to **assist PES in designing and implementing their approach to promoting the labour market integration of long term unemployed clients**. It provides concrete guidance and tools for PES in two areas: cooperation between employment and social services and job integration agreements. Apart from the practical tools, it also offers some insight into the rationale behind, and highlights the connections between the elements of service delivery. This may help practitioners to deepen their understanding of their role and to see how it fits together with the work of their colleagues in other parts of this complex system.

The toolkit helps PES to answer the following key questions:

- ▶ How to establish and maintain a single point of customer contact (SPOC) for Long Term Unemployed (LTU)?
- ▶ How to design effective and individualised Job Integration Agreements (JIA) to support LTU?

Why have a toolkit on measures for the long term unemployed?

Tackling long term unemployment tends to become increasingly difficult as time passes. The longer the unemployment spell, the more difficult it becomes for the job seeker to find a job and the less effort they may put in job search. This may be due to several related factors, such as declining motivation, the erosion of skills, discrimination by employers against the long-term unemployed, or the ranking of job applicants by employers on the basis of their time spent in unemployment. PES services and Active Labour Market Policies (ALMP) can counterbalance some of these effects or prevent them by shortening the unemployment spell.

In most EU Member States (MS), the PES focus on preventing long term unemployment and labour market integration efforts for the long term unemployed are not supported by the design and administration of passive benefits. While in most MS receipt of unemployment benefits is conditional on active labour market engagement e.g. job search, this conditionality is often not enforced, particularly where there are gaps in the scale or range of active measures. The recently issued [Council Recommendation on LTU](#) appeals to MS to increase the re-employment rate of the long term unemployed and develop PES services in three aspects. In particular, MS are called on to (1) increase coverage with higher registration

and active support for the long term unemployed, (2) ensure continuity and coordination between relevant services and (3) increase the effectiveness of interventions aimed at both the long term unemployed and employers.

The toolkit covers two topics that are particularly important for implementing effective services for the long-term unemployed and specifically mentioned in the text of the Recommendation. The first chapter focuses **on integrating employment services with social and other** services that are often needed by hard-to-place jobseekers. The second chapter shows how to implement **job integration agreements** (JIA) in order to activate (especially discouraged or de-motivated) clients. These two topics are closely interlinked. Good quality JIAs are a prerequisite to the effective activation of long term unemployed jobseekers, but will only yield good results if the PES are able and have the right tools to remove the barriers that prevent clients from returning to the labour market and are able to use these tools in a coordinated manner. You may find references on further aspects of supporting the long-term unemployed at the end of the toolkit.

Who is the toolkit aimed at?

The toolkit is aimed at all PES practitioners who are involved in designing or implementing a service inte-

gration initiative or a job integration agreement for the long term unemployed. It may also provide inspiration to practitioners looking for fresh ideas for evaluating and improving their existing practices.

How is the toolkit structured and how do I navigate around the information?

The toolkit is divided into two main chapters covering the two main topics. Each chapter is organised around **three main steps**, based on a cycle of continuous improvement:

1. **Planning and designing** – providing practical advice on the development of new or existing approaches to service integration and job integration agreements;
2. **Implementation** – providing practical advice on implementation issues;
3. **Monitoring and evaluation** – reviewing the whole process and feed back to the design phase. Each step contains a range of practical information tips around what to think about and which actions to take. This includes 'practical tips', tools and templates, PES examples and signposts to further information.

The toolkit is developed for people in a variety of PES roles. You can navigate around the information in various ways depending on your role.

Are you a practitioner charged with designing, developing and implementing service integration initiative?

If Yes, reading the first chapter of the toolkit, as well as the annexes is highly recommended.

Are you a practitioner charged with designing, developing and implementing the introduction or update of job integration agreements for the long term unemployed?

If Yes, reading the second chapter of the toolkit, as well as the annexes is highly recommended.

Are you an operational delivery manager?

If Yes, you may find Step 2 in both chapters especially relevant.

Are you a policymaker in PES and/or a government ministry?

If Yes, you should consider especially Step 1 and Step 3 in both Chapters.

Are you a performance and change implementation manager?

If Yes, you should especially consider Step 3 in both Chapters, while you may also find some parts of Step 2 to be relevant.

CHAPTER 1. COORDINATED SERVICES AND SINGLE POINTS OF CONTACT

Step 1. Planning and designing the coordination of services



KEY HIGHLIGHTS

In this step, you will learn:

- ▶ How to identify services to include and which agency should take the lead in the integrated system;
- ▶ How to allocate the roles across cooperating services;
- ▶ How to find the depth of integration that is appropriate for your organisation;
- ▶ How to weigh the advantages of virtual and physical single points of contact.



KEY MESSAGES

- ▶ Choose partners with care based on their “service relevance”;
- ▶ Assess the capability of each partner with care;
- ▶ Consider piloting your proposed model to test its relevance and effectiveness.

1.1 How to decide on what services to integrate?

The range of services to be integrated can be best derived from the *needs of jobseekers*. First you may consider which are the services that are needed by most or many of your long-term unemployed clients? These may for example include counselling on available social benefits, the administration of benefit claims, basic advice on health problems or debt counselling. If you do not have it yet, it is good to start this with a systematic analysis of the labour market barriers of your clients. Next, you may identify which of these services are most closely related to employment services and also to each other. Lastly, consider the obstacles to the integration process and limit the final range to the closely related services whose integration is manageable, given the constraints of the institutional context.

Services can be ‘closely related’ in several ways:

- ▶ The client needs to get (or is more likely to seek) service A before they can benefit from service B;
- ▶ Service A has a higher impact if provided together with service B;
- ▶ The providers of service A need to know about what and when the client is doing or receiving in service B in order to be successful (and possibly *vice versa*);
- ▶ The provision of service A and B requires similar skills, expertise and/or infrastructure.

1.2 How to decide on the depth of integration?

The depth of integration may range from voluntary, occasional cooperation to providing the services under one roof, in a united organisational framework. The optimal depth of integration depends on the relations between the services (see above), as well as on the institutional constraints. You may also vary the depth according to the service. Integrated but badly managed services are not necessarily better than separate, but well-managed services. Thus, it is important to choose the right depth that is still manageable.

To decide what may be feasible in your country, you may consider who are providing the services you wish to integrate:

- ▶ Do they belong to the government agency? Are they supervised by the same ministry? Does their funding come from the same source?
- ▶ Do they have the same or similar goals?
- ▶ Do they operate at the same level in the governance structure? Do their local offices serve the same geographical areas?
- ▶ Do they enjoy the same degree of autonomy?
- ▶ Do they use similar / compatible IT systems?

The more dissimilar the services, the more problems may arise during the reform and also in the management of the integrated system. In more general terms, you may also consider the overall efficiency of public administration in employment and social policy at all levels of the government. If it is weak, you may wish to start with a less ambitious goal, as a complicated integration reform is a challenging task even for a highly efficient public administration.

A related issue is the choice between cooperating with peer organisations or subcontracting service providers. This toolkit focuses on the former solution. This issue depends partly on the institutional context and especially the existing range of publicly provided services and partly on the nature of the particular service. For example, services that require highly specialized expertise (e.g. serving clients with a particular disability) are often provided only by NGOs. In this case subcontracting may ensure more control for the public agency over the quality of the service provided, compared to some form of cooperation in which the NGO has no contractual obligation to meet a particular quality standard.

1.3 How to decide which agency should be the lead in the integrated system of services?

There are advantages if the lead agency has labour market integration as their main goal, and some experience in and capacity for coordination. It should have a sufficiently dispersed local network: it is best if it already has a local office in each of the geographical areas where you plan to have an integrated unit. It also helps if it is well regarded by other agencies and if it already has a mandate to coordinate other institutions, otherwise this needs to be established during the reform, which may not be easy.

EXAMPLE



Competition of lead agencies in Germany

The German Hartz IV reforms have important implications for countries with complex institutional and governance structures wishing to integrate welfare services. As part of a series of reforms in the social sector in the early 2000's (the Hartz reforms), Germany embarked on integrating social and labour market services – with varying degrees of success.

In the pre-reform system the German PES (BA) was responsible for benefit delivery and the activation of insured jobseekers and those unemployed who have exhausted their UB. Municipalities were responsible for the reintegration of social assistance clients (benefits and service delivery). The pre-reform system was burdened by inefficiencies such as shifting responsibilities between the BA and the municipalities and varying service quality across municipalities (Konle-Seidl 2008; H. Mosley 2005).

Municipalities strongly opposed the original reform idea of creating a single agency because they feared losing political influence. A federal court ruling allowed them to opt out of the PES based merger of institutions, which resulted in two basic models of service integration. In the first model, responsibility for benefit administration and the provision of labour market services for the long term unemployed was handed over to municipalities and local job centres were not in any way involved in these processes. In the second model, job centres and municipalities formed a new legal entity called 'ARGE' to provide integrated services. In the German case, evaluation studies found the second model to perform much better in all important outcome indicators on the individual as well as on the regional level during the one year observation period (INFAS and WZB 2008).

In systems where the local government has a high degree of autonomy with strong performance incentives and municipal districts roughly correspond to local labour markets, it may be effective to delegate the lead role to the local municipality. If any of these conditions are not met, the agency responsible for activation and employment services may be a good candidate.

1.4 How to allocate the roles across cooperating services?

There is considerable risk in integrated systems that no single partner feels fully accountable for the actions of the partnership due to the shared responsibility (McQuaid 2010).

To ensure accountability, reduce unnecessary duplication, and avoid confusion, it is important to have a clear division of roles and responsibilities between cooperating agencies (or between the units after



EXAMPLES

Multidisciplinary teams in Denmark and Slovenia

Multidisciplinary teams are a first step to systematic cooperation across service providers.

- ▶ Denmark recently established multidisciplinary teams in the local municipalities, which assess and provide services to long-term unemployed clients with complex (health) problems. The team is comprised of employment experts and social workers delegated by the municipality, as well as health and education experts, who by law have to support the teams upon the request of the municipality. Municipalities can also commission external experts – e.g. employer counsellors – on a case-by-case basis. In most municipalities the teams have office hours on fixed days of the week, while in larger municipalities, the multidisciplinary team is always available to the clients (OECD 2015; OECD 2008; European Commission 2015a, Interview with a municipal expert, 2016). The teams served around 25 thousand clients in 2014, which equals roughly 10 per cent of the total long-term unemployed in Denmark (Deloitte 2015).
- ▶ Experts of the Employment Agencies and the Centres for Social Work in Slovenia have regular meetings (by law, at least twice a year but the meetings can be, and often are, more frequent) to discuss the cases of unemployed clients with more complex problems (e.g.: drug or alcohol abuse, serious social problems), whom the Employment Agencies cannot help effectively. The committees are made up of the experts of the two organizations and rehabilitation specialists and meet at the premises of the Employment Agencies. They discuss case by case what has already been done by the Employment Agency and what kind of measure would best serve the person's interest in terms of social/labour market reintegration. This form of institutional cooperation does not require large financial investments but can contribute to knowledge exchange, a deeper understanding of what the organisations do and thus a more effective service to clients (European Commission 2015b, Interview with an expert from the CSW).

a merger). In the case of shared roles (e.g. informing clients or planning), there should be one agency responsible for coordination of the partnership and service delivery. For example, it should be clear which agency is responsible for evaluating benefit claims, paying benefits, assessing needs, or drafting and updating a Job Integration Agreement (see further details in the next Chapter). Similarly, one agency should assume responsibility for monitoring performance, maintaining the joint database (if there is one), or organising joint training sessions for staff.

When allocating the roles, you may first consider who has the necessary capacities in terms of staff numbers and expertise, as well as proven effective-

ness. A secondary consideration may be the relations between roles: for example, it may be useful to assign the assessment of needs and the management of JIA to the same agency, as the quality of the JIA strongly depends on the understanding of client needs. It is especially important to consider where 'boundary' issues and risks might arise when customers receive different but related services from partners. It is good practice to develop a detailed customer journey that specifies processes and handover systems so that the long term unemployed clients are at the heart of the operation and the partnership.

1.5 Forms of partnership and depth of integration across services

The coordination of various related services may range from loose, informal arrangements to a full merger of institutions (Munday 2007).

- ▶ Complete separation/fragmentation of services
- ▶ Ad-hoc, limited, reactive cooperation in response to a crisis or other pressure
- ▶ Regular cooperation limited to sharing information on clients and services
- ▶ Multi-disciplinary teams of professionals, mostly at the local level
- ▶ Formal network or partnership to ensure planned and sustained coordination
- ▶ Agency or service partnership with joint funding or another form of sharing risks and responsibilities
- ▶ One-stop shop: multi-service agency with a single location for assessment and services.

To decide which form is feasible in your country, it is useful to assess where you stand now, and what differences there are between the institutions that may be involved in the integration process. It is also important to consider the capability of potential partners in a number of dimensions:

- ▶ Are they achieving their current goals?
- ▶ Will their role in the partnership be appropriately resourced?
- ▶ How committed are they to joint working or further integration?

If you are several stages away from the one-stop-shop level and the institutional differences are large, it is advisable to aim for an intermediate stage, so that you can keep the reform manageable. The country examples below may give you further inspiration.

1.6 Options for virtual and physical co-location of services

The physical co-location of services is especially useful if most clients prefer face-to-face contact or have poor IT skills, and also if travel between institutions is costly. Apart from improving accessibility for clients, co-location can also strengthen cooperation between experts, by reducing the costs of formal meetings and creating opportunities for informal encounters.

A shared website can be a first step towards co-location. It can pool information from several agencies and also provide on-line services. If the underlying IT system and database is shared between the cooperating institutions, the services can also be provided in an integrated way, so that clients may not even notice when their files are processed by several experts working in two or more agencies.

A second stage may be temporary but regular co-location, when interdisciplinary teams meet at scheduled times (e.g. 'pop-up' offices in youth centres) to provide a joint counselling session to clients.

The third stage is when agencies operate under one roof. Ideally, these physical units should be chosen to be within commuting distance for jobseekers of the local labour market and should be easy to reach for the main participants of the partnership as well. It is important to note that co-location does not automatically lead to cooperation: integration needs to permeate the planning and delivery of services and will be sustained only if the new system creates incentives for cooperation.

EXAMPLE



Formal partnership in Sweden

Sweden introduced a voluntary cooperation scheme at the local level, called the Coordination Associations (CA), to facilitate institutional cooperation between the PES, the social and health sector and municipalities at the local level. CAs have an independent legal entity and they are led by a local political board. The boards of the CAs are made up of representatives of the four organizations, including officials of the public authorities and political representatives of the municipality and the county council. CAs harmonise the goals of the participating organisations, launch joint projects (e.g. for the integration of immigrants) and also maintain inter-organisational teams that support the reintegration of long-term unemployed and to deal with people with health problems (Ståhl, Svensson, and Ekberg 2011; Ståhl et al. 2009; European Commission 2015e).

EXAMPLE



One stop shops in the UK and Denmark

- ▶ In order to facilitate the labour market integration of the long-term unemployed, a central aim of the Welfare-to-work programme of the New Labour government in the UK launched in 1997, the government created Jobcentreplus (JP) to provide integrated services for the unemployed. The JP system was implemented gradually from 2002 through 2007CP offices brought together the formerly separate employment service (ES) and benefit agencies (BA). Respective ministries were also merged. (European Commission 2015f)
- ▶ As part of a comprehensive municipal reform in 2004, Denmark merged the PES into the municipal system. Municipalities are responsible for employment and welfare service delivery (except for health care), and serve both the insured and the uninsured unemployed. Municipalities enjoy a high degree of autonomy but their performance is monitored by a thoroughly planned central monitoring and benchmarking system. (For more information, see for example: H. G. Mosley 2012; Bredgaard and Larsen 2009; AMS and European Commission 2013).



Step 2.

Implementing a service integration initiative



KEY HIGHLIGHTS

In this step, you will learn:

- ▶ How to assess your CSM needs and define key target groups for your PES;
- ▶ How to harmonise goals within the integrated structure;
- ▶ How to establish effective incentives for cooperation across integrated units;
- ▶ How to ensure the flow of information within the system;
- ▶ How to develop expert capacities.



KEY MESSAGES

- ▶ The cooperating units should explicitly share a clear headline goal to reduce long-term unemployment;
- ▶ Cooperation is not automatic: it needs to be encouraged by clear incentives;
- ▶ The improvement in information exchange can greatly increase efficiency, but reaping such gains requires careful planning and implementation;
- ▶ Staff training may be necessary even if PES staff are very experienced.

2.1 Harmonising goals within the integrated structure

The clarity and harmonisation of goals across the cooperating agencies is an evident pre-condition of successful cooperation. When serving the long term unemployed, all cooperating agencies should support the goal of promoting clients' return to the labour market. There may however be some variation in sub-goals that reflect the division of roles between the cooperating agents. This broader set of goals may for example include the reduction of indebtedness, poverty or drug addiction.

When an integration initiative entails the refocussing of goals for some of the agencies involved in the process, it is important to support their staff in reorienting their professional approach and adjusting their attitudes.

2.2 Incentives for cooperation within the integrated structure

Mergers do not automatically produce cooperation between units of government: you need carefully designed financial or administrative incentives to achieve that. Financial incentives may for example include grants or additional resources available to joint initiatives, or a mechanism that ensures that cooperating institutions can keep all or some of the savings they make on increasing efficiency by coordinating their services. Administrative incentives may be introduced via legal obligations, protocols and performance monitoring systems (European Commission 2012b). In countries where the governance of public institutions strongly relies on legal provisions, it is important to establish a clear legal basis for the cooperation of agencies.

Countries with a strong regional government may also rely on the alternative source of political accountability as an incentive. This was the (unintended) outcome of the Austrian reform initiative, where the central government did not succeed in introducing a standardised form of service integration but several regions implemented their own local solutions to the problem of increasing poverty among the unemployed (European Commission 2015f).

Combining a high level of autonomy with strong performance incentives can generate sustained cooperation between the units of an integrated system. The performance incentives (such as a transparent benchmarking system, as in the case of Denmark)

ensure that all agents have an interest in achieving the common goals, and as this requires them to cooperate, they will use their autonomy to find the most effective ways of cooperation. Autonomy also allows them to share the savings accrued in one part of the system across other parts that contributed to achieving those savings.

The absence of well-designed incentives can risk leading to practices in which agencies try to shift clients or costs to other agencies in the system. To reduce this risk, a combination of financial and administrative measures may be necessary. Financial tools may include end-of-year auditing and adjustment of budgets based on cost-effectiveness calculations for each agency (or service). An alternative is to introduce surplus accounts that pool savings and reallocate them to service areas in high demand. An effective administrative tool is to have a clear protocol in which a single case-worker (appointed by a review board representing all agencies) coordinates the customer journey and the services to be provided. That also provides a useful model through which the joint agreement (covered in the next chapter) can be delivered.

2.3 Strengthening the flow of information within the integrated system

Service integration offers the chance to improve data sharing between partners and individual advisers; and in the quality of information on client needs. This is a major source of efficiency gains in integrated systems, but reaping such gains requires careful planning and implementation. Furthermore, the effective management of integrated systems tends to require highly detailed and accurate information on the delivery process and on outcomes to support decisions on how to allocate resources between units within the system.

Information sharing may be hindered by attitudes, legal barriers and technical constraints.

Differences in professional cultures and values can affect the way information is shared, as there may be differences in how agencies and providers interpret the relevant policies and legislation. For example, health professionals may focus solely on medical aspects, while social sector workers record broader issues that affect various aspects of clients' needs, such as their family background or housing situation. Problems arising from such differences

PRACTICAL TIPS



Setting a shared customer service target is a powerful way of improving integration. See the PES Toolkit for Customer Service Measurement for further details.

EXAMPLE



Voluntary associations in Sweden

Swedish Coordination Associations (CAs) have strong autonomy as they are self-governed by the participating agencies and their budget is also provided by the participating organisations. The CAs are established on a voluntary basis but all four agencies' consent is required. In practice, this means that if one agency initiates it, the others cannot refuse joining the CA because refusal would harm cross-institutional relations in the long-run, which is an outcome all actors prefer to avoid. Though evaluations revealed some barriers to their efficient functioning (e.g. bureaucratic practices of the social insurance offices), the CAs bring about many benefits, such as improved inter-institutional relations and a deeper understanding of the different actors' activities. CA members also reported that this form of cooperation prevented the emergence of inconsistencies across institutions with respect to the services offered (Ståhl et al. 2009; Ståhl, Svensson, and Ekberg 2011).

may be reduced by supporting professionals in understanding each other's data needs, e.g. by creating regular opportunities for case conferences, joint training sessions and team building.

Legal barriers may arise from the lack of clear legislation on data transfer between separate legal entities and strong regulations on personal data protection. Data sharing for evaluation and monitoring purposes can be anonymised. However, when data sharing supports case work, the need to retain confidentiality about clients must be balanced with professional standards. The rules on who has access to which elements of a client's profile should reflect professional consensus on what information is needed for making good decisions when serving a client. Legal concerns can be eliminated by asking for the consent of the client to share their profiles, by using appropriate encryption technology in transferring and storing information, by the detailed differentiation of access-rights across service providers (to reflect their actual



EXAMPLE

Shared database in Slovenia

In Slovenia, though the PES and social services (CSW) are separate institutions, their services and activities have become synchronized due to a governmental reform that brought all types of social services under one roof (the CSW) in 2012. An important aspect of the reform was that a central database linking more than 44 data sources (ministries, the PES, social services, tax administration, municipalities, etc.) was established. This way, CSWs also have access to the profiles of their clients maintained and updated regularly by the PES. Access to the PES registers supports determining social benefit eligibility. The databases are updated every night (Interview with CSW expert, 2016).



EXAMPLE

Shared database in VDAB Belgium

The Flemish integrated service offers services for people seeking employment in the so called 'werkinkels' – local job shops that function as a single point of contact. As many local stakeholders are involved, such as Public Centres for Social Welfare, training services and the National Employment Office, it is important that a single file is created for every client including the data from all the partners using the VDAB Client Monitoring System (CMS) (European Commission 2015a).

The system collects data of jobseekers such as personal data, competences, experience, mediation and counselling information as well as the individual action plans (vacancies, job applications). The data relevant for the external service providers can be requested from the caseworker of VDAB. Certain data remain confidential and can be accessed only for mediation/counselling purposes. The system monitors when and by whom was the file accessed and modified. External providers cannot directly access the CMS. The staff of VDAB as well as the jobseeker can review and access their personal records through the [My career](#) on-line platform (Information provided by VDAB).

need for information) and by preventive actions such as the continuous monitoring of user actions in the database and clear rules and sanctions for unethical behavior (Information Commissioners' Office 2016). The obligation to holding paper copies and signatures on paper for a wide range of documents can also create a strong barrier as it tends to double the

administrative tasks of front-line staff, especially if the IT system does not follow (or only with long lags) changes in the professional protocols. This can be reduced by trimming such obligations to the minimum and by ensuring that the IT system is flexible.

The interaction of attitudes and legal or managerial rules of accountability may create further barriers. If levels of trust within the system are low (and/or professionals have limited information on how their colleagues handle personal information), while the risk of being held accountable for potentially sensitive information in a client's records is high, caseworkers will be reluctant to record such observations on shared information platforms. Such barriers may be reduced by providing training to caseworkers on how to document important but potentially sensitive observations about a client in a professional manner.

Technical barriers can stem from the incompatibility of IT systems used by the cooperating agencies, or inappropriate hardware support and software solutions. IT systems should facilitate fast and user friendly data entry (even in remote access), multiple users accessing the same records at the same time, and at least daily updates of the shared parts of the database so that all parties have up-to-date information. Databases and user needs tend to expand fast and a lot of staff time can be lost on waiting for a response in the IT system. You can reduce this risk by leaving ample room for such expansions when planning server capacity and broadband connections and using hardware that facilitates regular extensions. If you can bring the data management systems of all agents involved into a unified IT system, you may also achieve some economies of scale in the cost of IT development and maintenance.

2.4 Capacity building to enable staff to perform well in new roles

The integration process usually entails a change in skills requirements at several levels and positions of the arising new system. It may increase the need for forecasting, statistical analysis and policy design at the regional or local level to match their increased autonomy. And it typically requires new competencies from frontline staff who need to be able to assess and respond to the needs of new groups of clients, liaise with new partners, and possibly handle new IT tools as well. If these skills are missing or inadequate, there is a need for capacity building at the beginning of the implementation stage.

Retraining may be necessary even if the existing staff are very experienced. In Norway for example, the integration reform reduced the need for specialist knowledge in some positions and increased the need for generalist competencies. Beside competencies, staff attitudes may also need to be addressed. The Hartz reform in Germany is a positive example in this respect as it was successful in shifting staff attitudes towards the activation of all client groups, as opposed to only the insured unemployed.

EXAMPLE



Denmark

The Danish multidisciplinary teams use digitized case management that gives access to all stakeholders involved in the support of clients. Not only municipal departments but also external experts can access and edit these digital profiles, which can significantly enhance the transparency of actions taken by the different stakeholders (European Commission 2015a, Interview with a municipal expert, 2016).

EXAMPLE



Staff training in UK Jobcentre Plus

The Jobcentre Plus (JCP) reform merged Jobcentres (JC) and Social Security Offices (SSO) previously serving the long-term unemployed, and providing welfare benefits separately. A major aim of the initiative was to activate jobseekers with complex and challenging problems. Evaluation reports of the first pilots showed that former JC case managers were often insecure in dealing with the new target group. To equip them with the necessary skills, a comprehensive training programme was put in place. Staff reported that, besides training, working together with specialists (e.g.: New Deal staff) and guidance from JP managers also helped increase their skills and confidence (Lissenburgh and Marsh 2003).

During the creation of the JCP system, great emphasis was placed on the organizational aspects of the change (e.g.: different organizational cultures, traditions). Service provision under Jobcentre Plus was especially new to the former Benefit Agency (BA) staff traditionally used to back-office work involving little direct contact with clients. Another challenge was that the BA staff tended to feel that they were only playing the second fiddle next to JC staff in the new set-up. The transition of the old staff members to new work positions also created significant administrative and management challenges. To tackle these problems, senior managers responsible for the supervision of change led workshops to prepare the staff of both organisations for the new roles. Their work was complemented by newsletters, promotion materials and personal visits of staff from the already merged offices to the former BA and JC staff. These steps were essential to ensure the commitment of the key staff involved in the merger and to 'defuse the perception that the JC was taking over the BA'. As the clientele of the new JCP was much broader than before including more vulnerable groups, staff training was essential to the reorganization (Finn et al. 2005).





Step 3.

Monitoring and evaluation of integrated services



KEY HIGHLIGHTS

In this step, you will learn:

- ▶ Why and how to introduce monitoring and feedback into the implementation process;
- ▶ How to measure the outcomes of an integration initiative;
- ▶ How to evaluate design options.



KEY MESSAGES

- ▶ Introduce a unified monitoring system and include detailed process indicators;
- ▶ Evaluations can help a lot in identifying the most effective arrangements.

3.1 Monitoring and feedback during the implementation process

Service integration is a complex process that may potentially impact various client groups, service units and organisational levels in different ways. The impacts may also be manifold: reemployment rates may improve at the expense of increasing risks of poverty or administrative costs. Monitoring efforts during and after the integration reform should ideally cover these aspects in order to spot problems in time and make sure that the overall performance of the new system is effective and cost-efficient.

To be able to refine your integrated system, you will also need detailed information on the service delivery process, such as the steps of the client journey or staff time spent on counselling and on doing administration. You can keep monitoring costs under control if you build data collection into the IT system and generate indicators automatically. So, if you can invest in a unified IT system, it is useful to involve monitoring experts in its development from an early stage. Experienced staff members and managers can also help a lot in detecting inefficiencies in the new system. You may pool their observations and suggestions for example through interviews and virtual notice-boards, or by setting up a temporary advisory board of experienced mid-managers.

If the monitoring system is not integrated across cooperating partners, it is essential that the lead organization periodically collects feedback from partner organisations, and acts upon them.

Setting the right pace for the implementation is no less important: you need to allow ample time for spotting and correcting mistakes. The Jobcentre Plus reform in the UK is a good example for how a well-paced process can facilitate continuous adjustment and improvement. This learning-by-doing approach is especially useful in complicated integration reforms, which tend to bring up many design issues during the process that are specific to your institutional context and therefore cannot be decided on the basis of previous reforms or theoretical models.

3.2 Indicators for evaluating outcomes

You may need to adjust and extend your existing monitoring system with new indicators that capture the advantages and possible disadvantages of an integrated system. These may include for example

the length and 'smoothness' of the client journey (the number of referrals needed before the client received a service that responded to their need), time spent on administration, client waiting times in local offices, and possibly social inclusion and poverty. As outcomes will vary across clients, it is important that these indicators are available in a breakdown by the relevant subgroups, such as insured unemployed and long term unemployed, or jobseekers with complex needs. Lastly, you will also need to collect information on service costs per client and service unit, in order to be able to calculate the costs and benefits for the system as a whole and for each main unit.

3.3 Tools for evaluating the reform and testing design options

The most reliable way to evaluate the impact of an institutional reform is to run a pilot in randomly selected localities and then compare the change of outcome indicators in the pilot regions to the change in other localities unaffected by the reform. If random selection is not feasible for practical or political reasons, you may still try to use this approach and adjust the results for the observable differences between the pilot regions and the others (such as the unemployment rate and the initial conditions in the service providers). As mentioned above, this approach was followed in the UK, and also in Finland. In the Finnish case, the pilot of the Joint Service Centres was implemented in 18 municipalities in 2002 and rolled out nationwide two years later, when evaluations confirmed that the impact was positive (Arnkil 2004).

A similar approach can be used to test the effectiveness of various design options. For example, if you want to know the potential gains of including a healthcare professional in the newly established interdisciplinary teams, you may vary the setup of teams across localities (again, ideally the selection of locations with a healthcare professional is included should be random) and then compare the outcomes across the localities with and without the healthcare professional.

EXAMPLE



Piloting the UK Jobcentre Plus

Establishing the Jobcentre Plus offices took almost a decade. A series of pilot projects testing variations of the JP offices took place between 1999 and 2001. The pilots were run in dedicated trial format (ONE) in twelve areas covering about 10 per cent of the working age population. During this period, some local offices were fully integrated into a single point of contact while in other localities benefit and employment service provision remained split between the separate agencies but with enhanced coordination. This regional variation allowed researchers to conduct reliable impact assessments. Building on the experiences of the ONE pilots, 17 areas established the Jobcentre Plus offices in 2001. Nation-wide implementation started only in 2002 and was completed by 2007. The Jobcentre Plus model had undergone a series of adjustments and refinements throughout these years until the final design was created (European Commission 2015f).

EXAMPLE



Regional variation in integration models in Germany

The Hartz reforms of Germany are an example for testing alternative design options. Though in this case the regional variation was not part of initial plans (and therefore not random), the fact that municipalities achieved a permission to opt out of the federal reform process led to considerable regional variation in the new institutional structures. This variation allowed researchers to compare the effectiveness of the various organisational set-ups (Boockmann et al. 2013; Holzner, Munz, and Büttner 2009; Konle-Seidl 2008).



CHAPTER 2.

JOB INTEGRATION AGREEMENTS

Step 1.

Planning and designing Job Integration Agreements



KEY HIGHLIGHTS

In this step, you will learn:

- ▶ How to assess the capacity of your PES to design and implement JIA?
- ▶ How to identify the quality of JIA that the long-term unemployed served by your organisation need?
- ▶ How to design the content of JIAs in light of the two issues above?



KEY MESSAGES

- ▶ Job Integration Agreements should be personal, service orientated, and record shared goals;
- ▶ JIAs are most effective when they build from effective individual assessments;
- ▶ JIAs should be agreed with a personal job counsellor who sees the client at specified intervals to review progress.

1.1 How to design the content of a Job Integration Agreement?

Job Integration Agreements needs to comprise (a) an assessment of the individual's situation; (b) a minimum individualised service offer aimed at finding a job, and (c) it should include explicit goals and obligations for both the jobseeker and service provider. Note that in designing such an agreement, you need not 'start from scratch', since all European PES have some experience with individual action plans. An important starting point then is to critically review the way IAPs are established in your organisation, keeping in mind that long-term unemployed often have complex problems that hinder their return to the labour market.

For the JIA to meaningfully contribute to clients' re-integration, it is to be personalised, thus when designing the three basic elements of the content of an agreement, you should keep in mind the following two questions:

- ▶ What is the information that feeds into the personalisation process?
- ▶ What elements of the JIA are to be personalised?
- ▶ How often will progress be reviewed and with whom?

In general, personalisation is to be based on an **in-depth assessment** of the individual's situation. The simplest option is to base this on existing profiling and client segmentation tools (European Commission 2014). However these tools will need to be reviewed in light of the fact that often they are (i) based on relatively crude information and (ii) can only categorise individuals into broad groups. However, for hard-to-place jobseekers it is important to have a *holistic view* of the individual, and in particular, collect information beyond what is easily gathered from administrative records and relates to 'hard' skills. Thus, you should consider how to integrate information on 'soft' skills especially the jobseeker's motivation and expectations. Eliciting this kind of information

need not be complicated or costly, but it is important to have counsellors directly involved in the process of assessment. This is to ensure that (i) in a face to face interview, clients have a better chance to understand the nature and objectives of the process, and (ii) counsellors' 'buy-in'. Developing a complex and holistic assessment might seem a daunting (and costly) prospect, but learning from previous experience with profiling and segmentation tools, as well as co-operation between PES in sharing methods can help you narrow the range of options. For more information on how to implement in-depth assessments, please see Step 2 below.

An appropriate range of services and measures, which are personalized to long-term unemployed persons' needs are key to facilitating re-integration. In this respect, there are several key issues to consider.

First, to analyse whether the existing **range of services and measures** which the long-term unemployed are entitled to (and actually receive) within your organisation is sufficient given the barriers these clients are facing. During this process, you will need (i) a preliminary assessment of long-term unemployed persons' characteristics and barriers; (ii) a good overview of which services and measures are conducive to re-integration. It might be possible to analyse the first issue using existing information within your organisation or relying on statistical data provided by your national statistical agency. The second question might however call for you to commission or conduct evaluations of your programmes. When analysing this question, you will also need to consider the (complementary) social services available both within your integrated service unit and through external providers (including NGOs).

Second, in light of the analysis above, you will need to define (or revise) a **minimum service offer** within your organisation targeted at long-term unemployed. This should at the minimum include agreed in-depth job search assistance and counselling, specify review processes including frequency of meetings, and record the name of the case worker who will guide and advise the client. Optimally, the services and measures you identified to be most effective for this group should be included as well (note that this may change as the customer journey moves forward). When defining this offer, you might be to some extent limited by (i) the overall budget that your organisation can devote to services and measures and (ii) variations across regions in the availability of social support services.

1.2 How to decide on service quality for a Job Integration Agreement?

There are two main issues in designing the quality of a JIA: a) level of detail in drafting the JIA and b) how progress towards goals specified in the JIA is monitored and followed up. A crucial 'input' for both cases is caseworkers' time, which is needed for an in-depth assessment of jobseekers' needs and strengths; as well as for a regular 'nudge'.

Ideally all long-term unemployed are offered intensive guidance by counsellors, this however may not be feasible nor efficient for your PES. It is also important to ensure that – given the limited resources of your PES – the in-depth assessment and the quality of services offered are aligned. In order to proceed, you need to decide for whom and what level of services ought to be implemented. In particular you may consider:

What scale or type of service is needed by particular client groups?

- ▶ Do all long-term unemployed need intensive services or only a specific target group?
- ▶ How early is an intensive service implemented for those who need them?

What form and intensity of follow-up is necessary and feasible?

- ▶ Are personal counsellors assigned to each individual jobseeker?
- ▶ How often do long-term unemployed need to be contacted by their counsellor?
- ▶ Are these contacts to be simple check-ups on jobseekers' progress?
- ▶ Do these contacts need to be face-to-face meetings?
- ▶ How often is jobseekers' situation re-assessed and the JIA potentially adjusted?
- ▶ Do these re-assessment meetings need to be face-to-face?

In order to proceed on these issues, you will need an overview of the number and composition of long-term unemployed. In particular, you will need an estimate of the number of jobseekers facing **multiple barriers** to finding employment, since it is likely that these are the clients that will need intensive support the most. While existing client categorisation systems can provide some insight into this issue, further data analyses might be necessary.

Current best practices suggests that face-to-face meetings at least once a month (lasting 30 minutes) with a dedicated personal counsellor are needed to keep up disadvantaged jobseekers' job search motivation (see, for example Rosholm 2014). Furthermore, re-assessments of jobseekers' situation is to take place regularly, every six months. A basic follow-up of long-term unemployed would amount to face-to-face meetings with a counsellor every 3 months, with yearly re-assessments.

Thus, you should review the current practice in your PES concerning the *regularity, length and depth of meetings* between counsellors and long-term unemployed. Based on this, it will be possible to estimate how many additional counsellors are needed to provide intensive follow-up to all or a subset of the long-term unemployed. To be able to reallocate some of your staff capacity to services for the long-term unemployed, you may for example consider moving some services online.

Regular meetings and re-assessments both require and generate a sizeable amount of information. Thus, it is also important to keep in mind for planning the regularity of follow-up interviews whether *information on jobseekers' activities* (participation in programmes etc.) are recorded and transmitted in a timely fashion both within your organisation and across your partner organisations (for more detail see Step 2 in Chapter 1). Knowing whether the jobseeker succeeded in particular activities is vital for counsellors to keep track of the jobseeker's progress. If this is not the case, you may need to introduce standardised documentation before implementing a new JIA.

1.3 How to design the 'rights and duties' approach of a Job Integration Agreement?

It is vital for the jobseeker to make the goals that are part of the JIA their own, however, in case of non-compliance, a clear and enforceable sanctioning policy needs to be in place. When thinking about this policy, there are several factors you should consider.

- ▶ The effectiveness of sanctioning can be limited in cases where a client does not receive any form of financial assistance.
- ▶ Overly strict sanctions (such as full withdrawal of benefits) may be counterproductive.
- ▶ While sanctions lead to an increase in job-finding rates, these often do not lead to sustainable employment (Arni, Lalive, and Van Ours 2013, Arni, van den Berg, and Lalive 2015).

- ▶ The threat of sanctions – a warning about non-compliance and its consequences – can be almost as effective for job search effort as the actual imposition of a sanction (Cockx and Dejemeppe 2012), thus automating the imposition of sanctions needs to be considered with care.
- ▶ There are considerable differences across jobseekers in how they react to a sanction, and – while these factors are not completely understood –, it seems that this has to do with jobseeker's personality (DWP 2012).

Thus, the evidence to date seems to suggest that a clear and gradual sanctioning policy might be the most effective, sanctioning does not need to be automatic and counsellors should have some autonomy in imposing sanctions.





Step 2.

Implementing a Job Integration Agreement



KEY HIGHLIGHTS

In this step, you will learn:

- ▶ The different tools for implementing an in-depth assessment;
- ▶ The pros and cons to having counsellor autonomy in proposing services;
- ▶ The approaches and skills counsellors need to make the JIA a living document;
- ▶ The ways of scheduling follow-up meetings and assessments;
- ▶ The benefits of alternative approaches to mandating activities and sanctioning.



KEY MESSAGES

- ▶ In-depth assessments need to be holistic, incorporating tests jobseekers' soft skills and should also channel the client's own self-view;
- ▶ Without access to relevant measures and services, including complementary social services a JIA is devoid of content;
- ▶ Counsellors are the key 'input' into drawing up an effective JIA, they should receive specific training and have adequate time;
- ▶ On top of clear minimum service standards, counsellors can be given some autonomy and responsibility to personalise the JIA and follow-up.

2.1 How to implement an in-depth individual assessment?

Individual assessments are key to understanding clients' aspirations, barriers and needs and thus should be implemented carefully.

The key issues of implementation are:

- ▶ How much information on clients' situations do you regularly collect and record systematically?
- ▶ Do you need to supplement this information with an in-depth assessment of skills/ social capital/ health or psychological needs? Does this assessment need to be based on a formalised test or rather on counsellors' judgement?
- ▶ What role should the client play in their own assessment?
- ▶ Is it more judicious to have specialized counselors carry out aspects of the assessment and evaluate its results? If so how, will they work with the client's nominated employment/labour market caseworker?
- ▶ What are the resource needs of this assessment?

All PES have access to a sizeable amount of information collected for administrative purposes that accrues during a jobseekers' unemployment history. This is a potentially important source of information to be used in assessing the client's current situation and therefore as a minimum should be made available to counsellors. A further step can be to feed these data into a statistical profiling tool, which can summarise the information for counsellors.

There is a growing body of evidence that a number of 'soft skills' have a strong influence on unemployed persons' chances of finding a job.

If your organisation does not have such an in-depth assessment in place, you can choose from three main approaches. (For an overview, see (European Commission 2014).)

- ▶ Garner information from a **structured interview** with a counsellor, who scores the client on a number of dimensions.
- ▶ **Develop tests** with the assistance of psychologists that are straightforward for the jobseeker to answer and the results are reviewed with a counsellor.
- ▶ Employ the services of an **occupational psychologist** who work with standardised psychological questionnaires.

Whichever approach you choose for assessments, it is in most instances important to channel the client's opinion of themselves into the process. That will serve to both empower the individual, and to elicit information that might be missed in statistical profiling systems. Furthermore, it can be a cost-effective device (especially, if it is done online in a self-profiling instrument, such as in the Danish or Dutch system) insofar as it can also 'flag up' clients who need additional, specialized assessments.

Individualised assessments can require specialised skills from counsellors, hence it might be sensible to have *specialised counsellor teams*. This is the current practice in a number of PES where the initial 'screening' interview is not done by the client's personal advisor and might lead to more accurate results (see [Oschmiansky et al. 2014]). There are however good reasons why this might not be optimal. First, the separation of the assessment and counselling role might entail a loss of information. Second, the building up of a good understanding of the client's needs and a rapport between the client and the counsellor is integral to success. Third, the same interview skills that are needed during this initial assessment can help with eliciting information from clients later during the counselling process.

In-depth assessments are resource-intensive, and in particular necessitate the investment of a considerable amount of counsellors' (or other specialists') time. The PES should allocate *sufficient time to be invested in this activity*: it has to be accounted for in the work planning process, a minimum duration ought to be inscribed in internal guidelines and adequate time allowed for other necessary administrative duties. *Efficient IT support* is also essential for reducing the administration associated with assessment.

When deciding upon how to implement the assessment, you should be aware that either approach requires 'road-testing' and a considerable initial investment. Employing additional occupational psychologists is resource-intensive, so you might consider (possibly as a first step) implementing a simpler version of skills assessment.

2.2 How to match services to needs?

Once an in-depth assessment has been carried out, the counsellor and the jobseeker need to agree on a) what general goals the jobseeker is to work towards; and b) which services (and measures) the PES can offer her.

The first issue then is **how much autonomy to give counsellors** in selecting the right services for their clients, and how tight should be the *protocols* that guide counsellors in this process.

In the low-autonomy approach, protocols prescribe certain goals (and services) for jobseekers with a given set of characteristics. This may ensure that all clients have access to a minimum set of services, and that evidence on the (relative) effectiveness of alternative strategies feeds into everyday practice. Built-in recommendations are ideally structured on a statistical treatment assignment model that produces one or more suggestions to counsellors. The problem is then how to ensure that (a) counsellors 'buy-in' to the process and (b) counsellors can fine-tune the results in order that the JIAs are not overly standardised. Note that this approach requires setting up a fully integrated IT system, which guides counsellors through the process of assessment, goal and service selection.

In the alternative approach counsellors only have 'guidance', but are relatively free to choose the activation strategy for their clients. This requires counsellors who are well trained and fully understand the relative merits of alternative activation strategies. In this approach, it is important to have clearly defined minimum standards and regular supervision of the process of drafting integration agreements. Furthermore, when introducing JIAs, caseworkers need training to enable production of appropriately personalized agreements and to ensure buy-in, otherwise staff may take the JIA simply as a formalization of their previous practices ([European Commission 2012b](#)).

A second issue is that drafting JIA should encourage employment **counsellors to offer a range of complementary services** available to jobseekers in a way that are relevant to the individual client's needs. Thus, at the minimum, employment counsellors need to be aware of the potential added value of these social and health services for their clients. This requires a flow of information between different units in the employment and social support system (for more on this see Section 2 in Chapter 1).

The third issue is to find a balance between local **capacity constraints** and the services and measures clients should receive in the optimal case. This is an especially pertinent question in a system where counsellors have considerable autonomy in choosing support itineraries. A possible solution is to allocate

budgets to meet and reflect local needs, so counsellors can propose the purchase of a certain service from local (external) providers. This question is closely related to how current needs analyses feed into future capacity plans. This is easier in a system with tight protocols while it requires more elaborate planning and adjustment mechanisms in systems with considerable caseworker autonomy.

2.3 How to make the Agreement a 'living document'?

For the JIA agreement to truly alter and guide jobseekers' behaviour, it is crucial to tailor it to the individual's needs, to encourage building mutual understanding and trust between the counsellor and the jobseeker, and to have mechanisms through which the jobseeker can claim ownership of the process.

The key actor in guiding this process is the **counsellor**, you should ensure that both existing counsellors have received adequate training and support for the role and that training for new counsellors is sufficient and fit for purpose. In particular, advisors might need additional training in writing succinctly, and such that they are confident in summarizing material in a manner that both provides information on the clients' aspirations and needs, and which is in line with legal regulations. It is clear from previous experiences that having access to a *personal counsellor* who supports and supervises the jobseeker throughout her unemployment spell is key for disadvantaged clients. If your organisation does not currently employ this practice, you should seek to implement changes in work organisation to ensure it. A direct implication of this approach is to have counsellors specialised in working with long-term unemployed (disadvantaged) clients.

A further issue to consider is how to serve jobseekers who have little knowledge of the official language of your country. You will have to consider providing interpretation or recruiting counsellors who speak the languages used by the main migrant groups in your country, as well as translating the results of JIAs.

While it might be challenging to work effectively with long-term unemployed clients, the skills required can be acquired through *training*. Existing evidence suggests that the key competences include good interviewing and listening skills and certain attitudinal skills that are useful for dealing with entrenched cases (firmness balanced with sensitivity; patience and tenacity). Thus additional courses in these tech-

EXAMPLE



The 4-Phase Model in Germany

The German public employment service uses tight protocols to ensure that everyone receives the services best suited to their needs. Placement and counselling services are organized into a 4-phase model: the first phase consists of intensive profiling based on the strengths and weaknesses of the client regarding the target vocation, and identifies needs that are related either to the client personally or to his/her environment (e.g. family situation). In the second phase, the placement officer and the client agree on a realistic labour market goal, which should correspond to one of the ten options in the IT system VerBIS.

Following this, in the third phase they agree on a strategy to reach the goal. This is supported by the IT system, which offers different strategies for the clients' strengths and weaknesses. Finally, in the last phase, the strategy becomes part of the individual action plan, which contains the next integration steps for both parties. All four phases are part of the first interview, and they are all repeated in each follow up interview, providing an opportunity for adjustments in profiling, goals and strategies.

A survey conducted by caseworkers and managers of the German PES found that the protocol made processes more transparent both for the client and the advisor, it improved the validity and plausibility of profiles and strategies, and it facilitated the sharing of individual cases. Client satisfaction also improved since the introduction of the model. At the same time however, the new approach increased the workload of case workers and raised issues of personal data protection (European Commission 2012a; European Commission 2011).

niques and skills need to be developed and if possible mandated for counsellors specialising in working with long-term unemployed. Furthermore, since drawing up and following up on JIA might require a fair amount of familiarity with working with IT systems, the option of participating in IT skills training might also be necessary.



EXAMPLE

Flemish tailor-made approach

In Flanders (Belgium), for jobseekers who are facing obstacles in finding a job there is intensive guidance available by the counsellor of VDAB (Flemish PES). Such intensive guidance may be necessary in case the jobseeker lacks experience, technical competences, or has other problems hindering his/her re-employment. The caseworker identifies such problems at the intake, paying attention not only to employment-specific qualifications, but also to social skills, communicative skills, disability, mental health problems, limited mobility or childcare obligations. Based on these characteristics and conditions an individual action plan is created.

If the client has a problem during his job-search, they can request an appointment for an interview any time. The caseworker can request a diagnosis by a VDAB psychologist or an in-depth multidisciplinary screening by an external employment research centre, if there is a suspicion that the client/jobseeker may suffer of a severe mental health problem. If a work-disability or a mental health problem is detected, the jobseekers receive specialised support in their job-search (The European Network of Public Employment Services 2015; OECD 2013a; European Commission 2015a).



EXAMPLE

Increased caseworker autonomy in the case of disadvantaged jobseekers

The French public employment service provides people who face a set of cumulated difficulties – mostly LTU jobseekers – with intensive support ('Accompagnement renforcé'). In their case the contacts made on the advisor's initiative are more frequent, and they are always face-to-face meetings. A system of alerts and watch points is available to the counsellor on the jobseeker's changing status (changing benefits regime, exiting training program, finishing some immersion programmes, etc.) to ensure that the jobseeker does get followed up.

The employment counsellors serving intensive support clients have reduced caseloads (1:70); these counsellors also have each afternoon dedicated to interviews and work related to their jobseeker pool. Finally, counsellors have more autonomy in organising (face to face or telephone) interviews with their clients, and can vary the frequency of these according to individual needs.

According to a national survey on client satisfaction, 60% of those receiving intensive support think that the offered services are adapted to their situation and difficulties (European Commission 2015c).

Follow-up meetings are a crucial element in personalising the Agreement and strengthening the rapport between the counsellor and jobseeker. In general, relatively frequent meetings are beneficial since counsellors can better follow-up clients on the goals and tasks they have been set allowing clients to feel more accountable for their actions. Additionally, it is beneficial for the client since they can receive moral support, further help with job-search techniques and by potentially having access to more employer referrals. Furthermore, more meetings are conducive to a better understanding of the clients' needs. It is advisable to set a *minimum standard for the frequency* of meetings (at least every 3 months). If there is some local autonomy in the choice of measures, frequent meetings can lead to the counsellors proposing tailor-made measures and support.

There are added benefits to allowing for *increased autonomy for counsellors* to set the timing of meetings. This can ensure timely response to the client's needs, more support for those most in need and closer monitoring of the client's activities – for example for those suspected of working in the shadow economy. Note however that counsellors should not have the discretion to abandon minimum contact standards since this runs the risks of clients being 'parked' without contact – precisely the outcome we seek to avoid.

Both in the case of meetings at fixed intervals of time and caseworker autonomy it is important for the counsellor to take responsibility both for the organisation of his/her time and the scheduling of meetings. In practice, this can be facilitated by having specifically dedicated time for counsellors' contacts with jobseekers and an IT application that 'flags up' clients that are to be scheduled for an interview.

Closely related to the previous point, you should also consider scheduling formally dedicated face-to-face meetings for the re-assessment of jobseekers' profiles at regular intervals. While optimally, counsellors and jobseekers might continuously adjust goals set out in the JIA, it is important that a regular stock-take of such re-assessments is undertaken regularly for purposes, where the whole range of diagnostics used before the drawing-up of the JIA come into play.

A final tool in making the JIA a personalised document is to adjust it to incorporate the mandatory elements (such as the minimum number of job applications or participation in public works or similar programmes) for clients. In principle, there can be benefits for coun-

sellors to have some operational leeway within the legal and policy framework governing these elements. Mandatory activities and the associated risk of sanctions can create conflict between the counsellor and the client, but can also often aid the building up of a collaborative relationship by providing clear expectations on both sides.

The individual client's attitude, personal confidence levels, realism concerning prospects of re-integration into specific sectors, and the external labour market situation at a given time are all relevant considerations that should be taken into account by counsellors when deciding upon the use of sanction policies.

EXAMPLE



Frequent meetings in Denmark

An experimental (RCT) programme (called 'Alle I gang') was carried out in Denmark in 2008, where persons receiving social assistance and were unemployed for at least half a year, received more intensive follow-up. This meant that they met their counsellors once a week (as opposed to once every three months) and also participated in additional (group) counselling sessions during a six-month period. On average, the short term impact of the programme was a negligible increase in re-employment, and a large outflow into ALMPs. However, there were large variations across regions as the participating nine jobcentres had some discretion regarding implementation. In two jobcentres intensified meetings and counselling was implemented, without an increase in referrals to ALMP-programmes. In these two jobcentres, the participants spent two weeks more in employment than non-participants and the programme achieved a positive net benefit of about 1,300 € per participant (over ten months) (STAR 2009).



Step 3.

Monitoring and Evaluating Job Integration Agreements

3.1 Monitoring JIA using process and quality indicators

Monitoring quantitative indicators of the process of drawing up and following-up on JIAs can be a relatively straightforward exercise if fully integrated IT systems are available enabling counsellors to 'log' their activities and update client's profiles recording interventions. This however is only helpful for monitoring whether some basic requirements of service provision are met, such as:

- ▶ The use of personal assessment tools;
- ▶ The correspondence between the in-depth Assessment results and the proposed goals and support;
- ▶ The frequency and length of meetings;
- ▶ The regularity of updating client profiles and JIAs.

There are several issues to keep in mind. First, the monitoring of such quantitative process indicators is not informative of the quality of JIAs (and counsellor-jobseeker interaction) checking the Quality of JIAs is also essential. Secondly in an organisation that lacks an IT system where processes are recorded in 'real-time', the administration of counsellors activities might require a considerable time investment, hence only those indicators that are deemed most important (such as those that constitute the minimum service offer) are advised to be recorded.

Monitoring the qualitative aspects of JIAs requires supervision by senior or specialised staff. This can come in the form of specialised teams reviewing samples of JIAs, or team discussions and constructive feedback to counsellors.

3.2 Monitoring JIA using outcome indicators

Collecting data on intermediate and final outcomes of clients can also be used to check the quality of Agreements, and can be done in a variety of ways.

To monitor intermediate outcomes it is worth:

- ▶ Including questions in customer satisfaction surveys on how jobseekers have used the JIAs and how valuable they have found them;
- ▶ Monitor whether jobseekers lodge complaints about the process for developing JIAs;
- ▶ Collect data on whether jobseekers have reached their short-term goals (as specified in the JIA).

Since the ultimate objective of the PES is to re-integrate jobseekers in the (primary) labour market, it is advisable to collect data on the long-term outcomes of those who sign a JIA and use this to assist in reviews of the design of the process. This information can be used in an (counterfactual) evaluation study which aims to estimate whether signing an Agreement leads to more time spent in employment. There are however difficulties with conducting such a study: a JIA is a 'bundle' of different elements, which all jobseekers must sign. This setup inhibits both finding a valid 'comparison group' and evaluat-



KEY HIGHLIGHTS

In this step, you will learn:

- ▶ How and what indicators to monitor the process of JIA
- ▶ An approach to measure whether the JIA reaches its intended purpose
- ▶ How to plan the content of JIAs in light of the two issues above.



KEY MESSAGES

- ▶ Poor quality JIA only increase the administrative burden without much effect on employment: it is therefore important to include indicators in your monitoring system that promote the quality of JIA.
- ▶ Use monitoring and evaluations to adjust and refine the process of implementing JIA.

EXAMPLE



Quality assessment of IAPs in Estonia

The quality assessment of the IAPs in Estonia is part of the quality-related indicators in the performance management system. The aim of the quality assessment of IAPs is to ensure that the needs of the jobseekers are taken into account and that the outlined support measures are relevant for the jobseeker. A random sample of 130 IAPs from all the regional offices is reviewed twice a year by a specialist team.

The specialist team consists of three members who have been working with jobseekers before and therefore know the principles of case management and work-focused counselling. Guidelines for the assessment of the IAPs are also available for the specialists.

The IAPs are scored from 1 to 4 on five aspects:

- ▶ Data overview and accuracy, risk group (does the IAP specify the possibility of the jobseeker belonging to a risk group);
- ▶ Identified obstacles, planned activities helping the job-search, measures to overcome the obstacles identified;
- ▶ Agreed activities;
- ▶ Results of the agreed activities;
- ▶ Overview of what was discussed with the jobseeker, results of job-search.

The scores for the quality of IAPs are provided for every regional office as well as for the whole organisation and also include detailed feedback on the IAPs. The assessment also serves as a baseline for individual feedback for case managers twice a year. Targets for the indicators are set annually and the actual scores are part of the performance dialogue. The quality of IAPs improved from 2.76 to 3.14 between 2012 and 2014 (European Commission 2012a; Radik 2016).

ing the influence of individual elements of the JIA. To undertake a causal analysis, researchers have to rely either on a piloting phase (where the use of JIA is staggered across local offices), or on experimental studies where some elements of implementing JIA vary across randomly selected jobseekers.

3.3 Feedback to implementation from monitoring and evaluations

You can use the results of monitoring and evaluation to adjust the implementation of the JIA in order to improve outcomes. For example, poor correspondence between client needs and recommended measures may signal a need for staff training or tightening of protocols. An overall decline in time allocated for counsellors to spend on drafting and updating JIA may be a false economy generating a subsequent requirement for an expansion in staff numbers in order to reduce caseloads. The differential outcomes from more extensive employment counselling leading to jobs as opposed to referrals to various training programmes is a further issue that could be evaluated overtime.

EXAMPLE



Flemish Customer Service

The Individual Action Plan in the case of the Flemish employment service represents an agreement between the VDAB and the jobseeker, and is compulsory for jobseekers receiving benefits and receiving personal services. The IAP is a way to ensure that jobseekers know what is expected from them. However, the IAP contains also a phone number where clients of the Flemish employment service can report a problem or make a complaint in case they were not provided the best service. These complaints are examined by an independent customer service focusing on the customer and feedback is provided directly to the caseworker. The caseworker receives feedback on the justification of the complaint and on the response to the complaint. Frequent complaints concerning the same caseworker can lead to a note in the personal file of the caseworker.

VDAB publishes a report on the complaints every year. The main subjects of complaints in 2015 (as in 2014) are the individual action plan (30%) and training (22%). The complaints regarding IAPs are mostly concerning the restriction on professional integration benefits and the assessment of jobseekers' effort to find a job by the caseworker (a problem of customer perception) (Information provided by VDAB).

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Further information and resources

You may find further information on various topics related to promoting the reemployment of LTU in the European Commission's PES learning resources. The most relevant resources include

- ▶ [PES approaches for sustainable integration of long-term unemployed](#)
- ▶ [Skills-based profiling and matching in PES](#)
- ▶ [PES Approaches for Sustainable Activation of Low Skilled Adults and Youths: Work-first or Train-first?](#)
- ▶ [Cost-benefit analysis of remedial interventions for the long-term unemployed](#)
- ▶ [Activation and integration: Working with individual action plans. Toolkit for Public Employment Services](#)

For inspiration on further related topics, we recommend the following toolkits:

- ▶ [Practitioner's toolkit: Performance management in PES](#)
- ▶ [Quality Management: The Professionalism of Employment Counsellors – The Toolkit](#)
- ▶ [Practitioner's toolkit to assist PES with the development of customer satisfaction measurement systems](#)

You may find useful details on the employment of senior workers in 'Meeting the Challenge of Europe's Aging Workforce: The Public Employment Service Response', or in 'The Role of Public Employment Services in Extending Working Lives'

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