

# **Report on the stakeholder meeting**

## **"Digital Formats of Educational Guidance"**

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Note: This report, including the content of the presentations and the recommendations for action, does not necessarily reflect the opinion of the European Union or those responsible.

## 1. Context of the event

As part of the implementation of the European Agenda for Adult Education, a stakeholder meeting on the topic of "Digital Educational Guidance" took place on 28.02.2023 from 10:00 to 14:15. The event was organised by the National Coordination Point European Agenda Adult Education of the National Agency at the Federal Institute for Vocational Education and Training in cooperation with the Ministry of Education, Youth and Sports of Baden-Württemberg. Politically, the event was located in the projects of the "Upskilling Pathways" initiative and the education policy priorities of the National Continuing Education Strategy. The event was aimed at invited representatives and experts from politics, practice and science.

Hans Georg Rosenstein from the National Agency of the Federal Institute for Vocational Education and Training and Suzan Bacher from the Ministry of Education, Youth and Sport Baden-Württemberg welcomed the participants as joint organisers. Among other things, they emphasised the great interest in the event and the importance of the topic, among others for groups of people with low participation in continuing education. In order to reach these target groups - according to Ms Bacher - it is important to expand low-threshold guidance formats. Online guidance can make an important contribution to this. However, there are numerous challenges and questions regarding the concrete design.

## 2. Contributions from speakers

**Prof. Dr. Henning Pätzold** reflected on the increasing importance of artificial intelligence (AI) in guidance contexts in a keynote speech jointly prepared by him and **Dipl. Päd. Joshua Dohmen (both University of Koblenz)** entitled "**Potentials and limits of media-supported, supraregional offers for continuing education guidance**". The lecture began with a thought experiment on the use of the ChatGPT tool in continuing education guidance. This is a dialogue-based chatbot based on AI. ChatGPT uses AI to understand human language and generate an output or response similar to human language. The advantages of the application were identified in the presentation:

- High level of language, sense of interaction
- Available at any time
- Location-independent
- huge data corpus
- many domains addressable.

Limitations and disadvantages were mentioned:

- The statements remain vague, are not very concrete.
- There is no training data on specific offers.
- The tool does not ask any questions (as opposed to consultative questions).
- The system makes gross factual errors.
- There is a danger that the tool takes away the decision from the person seeking advice.

Furthermore, a complex **research project on free telephone counselling** was reported on, whereby the results presented in the lecture were based on 49 short telephone interviews with continuing education counselling centres. The following questions were linked to this: Can databases or AIs realise the necessary empathy when critical situations arise in the counselling process, e.g. counselee bursts into tears? The hypothetical answer was: AI might be able to do that, but databases cannot. Similar questions arise when strong emotions arise in the counselling process, such as confusion, being overwhelmed, helplessness or even aggression, and these first have to be dealt with to the extent that a continuation of the counselling process is possible.

Finally, Mr Pätzold pleaded to be guided by a broad concept of media and accordingly formulated the thesis that the term "medially mediated" encompasses more than guidance based on the internet, especially since the internet rather offers an infrastructure to use different tools.

Experience shows that people seeking advice first search via Google or other general search engines, not via CET databases. This can lead to a poor match between interests and the proposed offer. However, it was noted that databases are also by no means low-threshold. Rather, the requirements for use are high, since continuing education is a complex phenomenon. The requirement for a digital offer is to deal with the complexity of continuing education in the same way as personal counsellors would.

In the discussion, it was noted that the chatbox tool does not contain a reference to counselling centres. For these and other reasons, it was noted that the question of how decentralised, regional structures can be adequately represented in nationwide tools must be solved. Media disruptions were also highlighted as a problem.

**Regine Zizelmann and Joshua Wegerer from the coordination office of the Landesnetzwerk Weiterbildungsberatung (LNWBB) in Baden-Württemberg** reported on the work of this network under the title "**LNWBB - Portrait and Status - Further Development of Online Guidance**". The aim of the network, which emerged from the Alliance for Lifelong Learning in Baden-Württemberg, is to offer provider-neutral and free CET guidance in all regions of Baden-Württemberg on general, vocational and academic CET close to home or online. The sponsor of the LNWBB, which is funded by the Ministry of Education, Youth and Sports of Baden-Württemberg, is the Adult Education Association of Baden-Württemberg. The network currently has 186 institutional members. The speaker reports on the reasons for counselling, age and nationality of those seeking counselling, the regional distribution of counselling providers as well as the development of the quantitative utilisation of the counselling services. With regard to online counselling within the network, it was shown that its share has increased significantly since 2020, i.e. the Corona pandemic. A survey conducted in February 2022 showed that 71 member institutions, or 44%, offer chat counselling and another 24 member institutions are interested in online counselling.

In April 2022, a kick-off event was held to modernise online guidance. It shows the need to modernise chat counselling, as it was assessed as not optimal under aspects such as user-friendliness or appearance. In addition, a sole focus on chat guidance no longer seems up-to-date. Through the initiative Weiter.mit.Bildung, there is an opportunity in Baden-Württemberg to expand online counselling. This is also linked to the hope of reaching rural areas better with digital services. A modular and flexible use of digital guidance formats (chat, messenger via Facebook|Telegram|SMS|Threema and WhatsApp, audio and video telephony) is planned according to the capacities and needs of the respective guidance providers. A first test phase involving guidance providers from general, vocational and academic continuing education will take place in the 1st half of 2023. In the 2nd test phase, participation is to be successively expanded. The aim is to achieve a uniform appearance in order to avoid redundant developments and parallel structures, to be able to advertise the offers in a more targeted manner and to be found more quickly.

**Brigitte Franz from the Senate Department for Integration, Labour and Social Affairs in Berlin and Frank Schröder from kos GmbH** reported on Berlin experiences on the topic of **"Guidance in Education and Careers in the Digital Transformation - Practice and Experiences"**. The speaker first gave an overview of the goals and structure of counselling on education and career in Berlin.

It was then explained that the counselling sessions were changed ad hoc (due to the Corona pandemic) to telephone counselling and counselling via e-mail or video conferencing tools from March 2020. For this purpose, the hardware and software were newly set up or expanded or converted, conformity with data protection regulations was checked and the counsellors' competences for media use were expanded. Also on an ad hoc basis, exchange and cooperation online and via video were cultivated in the Berlin-wide network, in the teams of the counselling facilities as well as throughout the district with other organisations and interested parties.

The goal is seen in an analogue *and* digital guidance organisation. It was emphasised that counselling opportunities and access have become more diverse in terms of places, spaces and forms and that digital key competences are therefore required. In this context, quality development in this regard is seen as necessary in terms of digital and sustainable infrastructure, processes, communication and appointment management. This implies a new (media) didactic preparation and design of the guidance process. Critical remarks made included the fact that

- the different forms of counselling (in person, by telephone, by e-mail, by chat or by video) each have their own conditions with regard to implementation,
- it is important to analyse the digital accessibility, digital equipment and digital empowerment of those seeking advice; and
- a critical approach to digitality as a context of guidance is required in terms of data protection in the sense of informal self-determination.

**Anne Bertelt and Elisabeth Tadzidinoff from the Gesellschaft für innovative Beschäftigungsförderung mbH (G.I.B.) in North Rhine-Westphalia** reflected on "**Digital formats of counselling on further education and career change processes**". The counselling service for the development of professional perspectives in working life (PiE) is a funding programme of the Ministry of Labour, Health and Social Affairs of North Rhine-Westphalia (ESF funding). It is supported by the G.I.B.. It is aimed at people in processes of professional change and, if required, also offers expert advice on the recognition of professional qualifications acquired abroad and (thus) makes a contribution to securing skilled labour. The nationwide, free counselling service of up to nine hours is aimed at citizens who live and/or work in North Rhine-Westphalia, regardless of their residence status. There are currently 140 PiE counselling centres with 260 counsellors. In addition to face-to-face counselling at fixed locations and mobile counselling, hybrid counselling and video-based counselling is also offered.

Written-based, asynchronous online counselling is offered on the continuing education portal. Registration (personal account) is required to use the online guidance service. The service promise provides for a response within three working days. Chat counselling is also available as an option. The counsellors working there receive relevant further training in the field of writing-based online counselling, and opportunities for exchange of experiences are offered.

A large proportion of the counselling enquiries in the context of online counselling are on the topic of financing options for continuing vocational education and training (e.g. Bildungsscheck NRW). Enquiries about (still unclear) career change requests **are** also frequent. Other counselling topics include, for example, initial information on specialised counselling for foreign vocational qualifications, CET opportunities. Approx. 87% of enquiries come from private individuals and 13% from companies, approx. 65% from women and 35% from men; approx. 63% of those seeking advice are employed. In terms of age, approx. 20 % are aged 16-25, 31 % between 26 and 35, approx. 25 % 36-45, approx. 18 % 46-55 and approx. 4 % over 55.

The final presentation was an international contribution by **Karin Okonkwo-Klampfer from the Educational Guidance Service in Vienna** entitled "**Educational Guidance via Messenger**". Ms. Okonkwo-Klampfer's presentation referred to a project in Austria, which is carried out in 6 provinces and financed by the European Social Fund, the national Ministry of Education and the provinces. There are 7 network partners in the Vienna network.

Text-based counselling via email and appointment chat has been carried out in Vienna since 2010, video counselling since 2015, initially via Skype, counselling via an appointment booking app since 2017, via Zoom and outreach counselling online (Facebook) since 2020, messenger counselling since 2021. E-mail counselling takes place via a data-secure platform (beranet). Outreach counselling on the net is targeted at Turkish-speaking women.

With messenger counselling, counselling seekers contact counsellors via Facebook Messenger or WhatsApp. The software "Userlike" makes it possible for counsellors to process all channels in the Message Centre and is compliant with the current data protection regulation (DSGVO). The advantages of messenger counselling were highlighted:

- Easy accessibility - especially with messaging apps
- Connection to the customers' usage habits
- Asynchrony (for messaging apps)
- Conversations can be read on the smartphone
- First point of contact for quick information - Switch to other channels possible - Blended counselling
- Sensible combination with outreach counselling in the network

Challenges for the setting of messenger counselling were named:

- Speed/Fluidity - especially for website chat
- 24h limit on WhatsApp
- Resource requirements (website chat)
- Experience with text-based guidance or training
- More information preparation, less procedural counselling
- Asynchrony changes the work process
- Ongoing advertising measures necessary

### 3. Recommendations for action

#### *Relevance of the topic*

The contributions at the stakeholder meeting confirmed the perception that the Corona pandemic has led to a push towards media-based counselling - which is not surprising as face-to-face counselling could not take place for long periods of time due to the pandemic. There is much to suggest that online counselling will be maintained or expanded even after the Corona pandemic. In the future, it will therefore be important to develop flexible concepts of blended counselling. In this context, it is important to master the challenges posed by the digitalisation of counselling and to design interfaces to face-to-face counselling well.

#### *Differentiation of the settings*

It seems important to sharpen the use of different terms. For example, Prof. Pätzold pleaded for the use of a broad concept of media, which should cover a broader spectrum than online counselling based on the internet. Also with regard to the term online counselling, a further differentiation seems necessary, because the different settings each have different logics and thus specific advantages and disadvantages. A central difference concerns the difference between written-based counselling settings (chat, email etc.) and those based on oral communication (e.g. video counselling with conference tools or telephone counselling via Skype). The written-based settings can be classified as particularly low-threshold. However, they are also the most affected by the reduction of communication channels, which limits counselling interaction and require a relatively developed writing competence. Settings based on oral communication with visual contact are perhaps not quite as low-threshold and also have some limitations compared to co-presence communication. However, they allow e.g. visual contact (although not eye-to-eye) and non-verbal communication such as gestures, facial expressions can at least be perceived, although also with limitations. The video-based settings thus come closest to face-to-face counselling, but have the advantage of being location-independent.

In the contributions at the stakeholder meeting, experiences with settings with written-based communication were predominantly reported. Other settings such as video counselling were mentioned in the slides, but the impression was that there is either not much experience in these areas yet or that they are implicitly not considered as relevant for educational guidance. This could be due to the selection of the contributions. Nevertheless, the hypothesis suggests itself -



without having a complete overview - that this focus reflects current practice in educational guidance. From the rapporteur's point of view, it would make sense to also carry out systematic trials with video-based guidance, especially since the use of useful conference tools for this purpose is becoming more and more established and should at least be known to large groups of those seeking guidance.

#### *Advice based on artificial intelligence (AI)*

Recently, AI-supported guidance has gained significant attention. Basically, this is also an online counselling setting, but since it has a fundamentally different quality, as there is no longer a human being directly involved in the process, it is listed separately here. With regard to instruments such as ChatGPD (see contribution by Prof. Pätzold), the most intensive question is whether essential elements of counselling can still be realised there. This concerns the following questions, among others:

- Does AI-supported counselling sufficiently succeed in addressing the *individuality* of the respective cases?
- Is AI-assisted guidance able to build an appropriate *relationship with* guidance seekers?
- Does AI-supported guidance ensure *openness of results*, or do the suggestions offered tend to take decisions away from the guidance seekers?

#### *Cross-media challenges*

Regardless of which digital media are used for educational guidance, the following challenges arise:

- Core elements of the *procedural design* for the respective settings (e.g. chat, email, video counselling) should be elaborated, referring to the respective advantages and limitations of the different settings. The contributions at this stakeholder meeting rather gave an overview of implemented or planned activities and therefore could not address this micro level. A joint reflection of cases on the different settings with counsellors could be helpful and useful.

- Core elements of *counsellors' competences* for the use of digital settings should be defined and corresponding training concepts should be developed or shared. This concerns both competences that relate to the design of a digitally supported guidance process and those that deal with changes in professional and social structures due to digitisation, because guidance can also provide a place for reflection on the dynamics of digitisation. In order to avoid duplication of work and structures, an agreement on a kind of basic curriculum or central modules would be helpful.
- It also needs to be clarified which *competences guidance seekers* need to use digital guidance services, which target groups already have them and how the competences of other target groups can be strengthened.
- The use of digital guidance formats requires changed *organisational structures*. This concerns, among other things, appropriate equipment with the necessary media, clarification of data protection issues or the updating of quality development approaches.

#### *Need for systematic evaluation and basic research*

Valuable practical reports were presented at the stakeholder meeting. A systematic, accompanying evaluation of the experiences with digital guidance settings would be urgently desirable. In addition, basic research is necessary in order to sound out the advantages and disadvantages or limits of the respective settings as well as to find out about acceptance and use among different target groups. This concerns, among other things, the procedural design of communication in the different settings, scenarios for concepts of blended counselling, the organisational and social context of counselling as well as a systematic impact analysis.