

Introduction

During 2012, the Big Lottery Fund invited the West Lancs Disability Helpline to apply for some funding from its Supporting Change scheme. The charity was awarded just under £10,000 and used this money to commission an independent consultant (Alan Lawrie from Mellor Lawrie Management), to undertake an external review between May and September 2012.

The overall purpose of the consultancy was to review the charity's development to date, identify opportunities for future development and agree a strategy and provide support and guidance to the charity in developing a sustainable future.

The methodology included reviewing the charity's activities, reports and other papers. The consultant interviewed trustees, staff, volunteers, funders, partner organisations, client groups and statutory sector organisations. To engage with clients, he issued a postal survey and reported on the responses. *The consultant holds the confidential responses from our clients so we cannot find out why some are not entirely happy. We show in several graphs a summary of the clients' responses to the survey.*

In September 2012, the charity held a Strategy Day, in which the team heard a report from the consultant. This addressed the heart of the sustainability strategy after September 2013, when the current six-year grant from the Big Lottery Fund ends.

This evaluation for our "Advice Self-Help" Reaching Communities project sets out our key findings as follows:

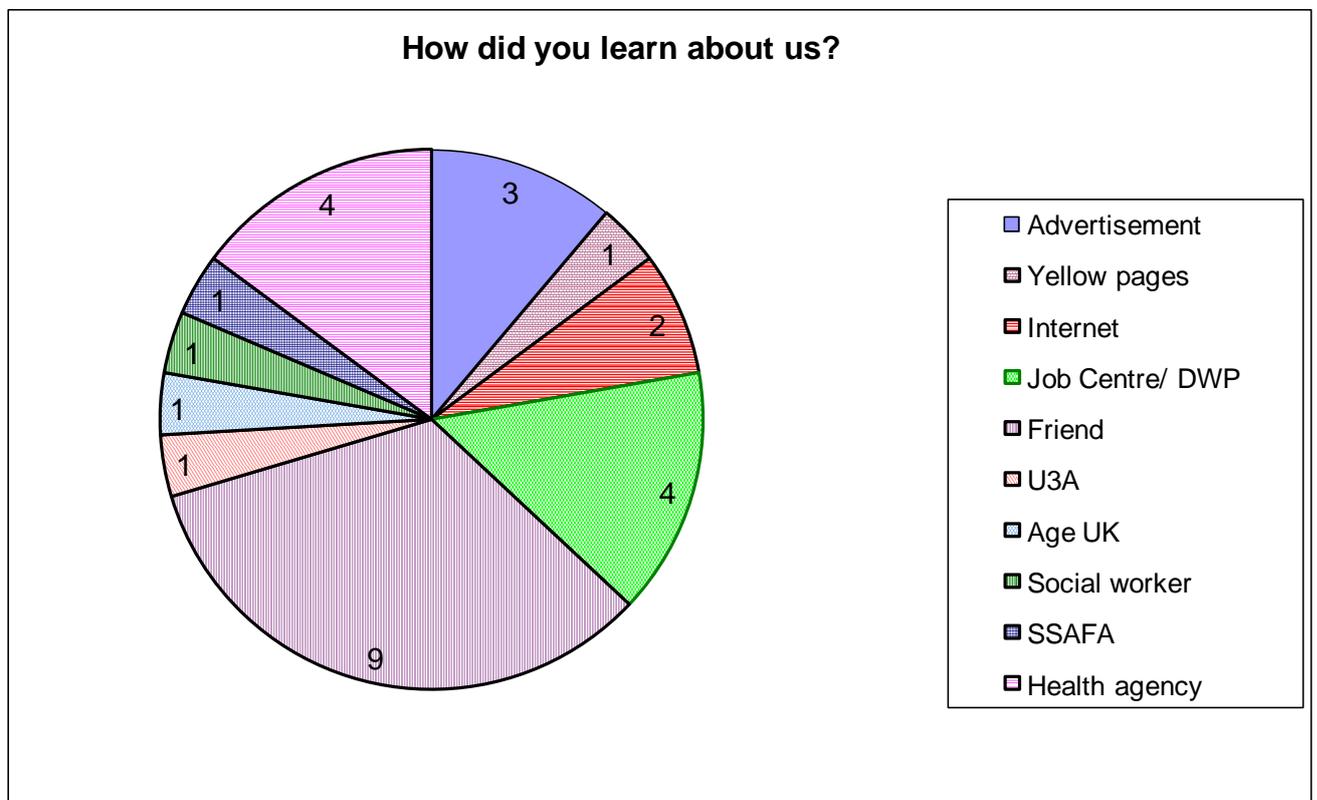
- Continuing to make a difference
- There remains a need
- What has worked well
- What we could do better if we receive more funding (which forms the future strategy that is the basis for this new innovative project)
- Future strategy.

Continuing To Make a Difference

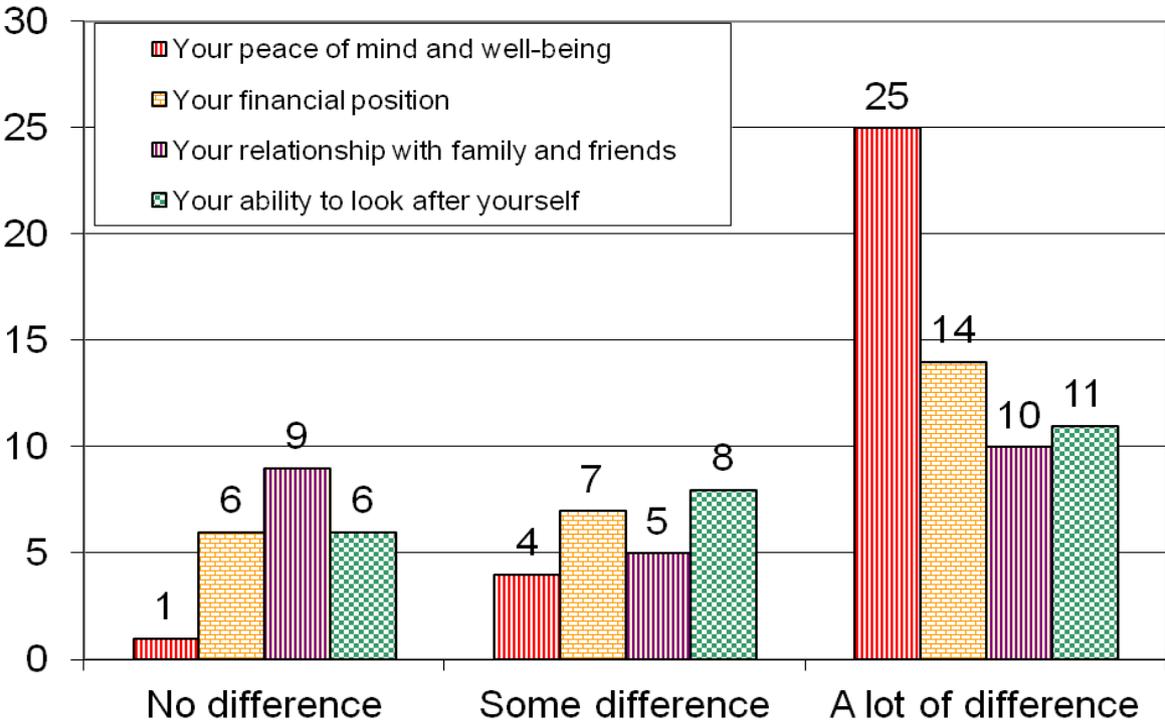
Clients' postal survey results

This section displays six graphs, compiled from data gathered from the responses. These responses clearly show that we are continuing to make a very positive difference to clients' lives. Clients say that we well-established in West Lancashire.

Clients very strongly appreciate the service and they hold us in very high regard. Levels of client satisfaction are very positive. The graphs show that we deliver significant outcomes for them in terms of improving and maintaining health, improving their household income and in their ability to live independently and/or caring for others.



What difference has the Helpline made to you?



Were you happy that the information was easy to understand?



Excerpts from clients' questionnaires

"The problem was sorted out quickly and gave my wife and myself peace of mind."

"I have mental health issues and the team took all the stress away and worked on my benefit and got me what I needed."

"A great help and now I have a home and I know I can't end up on the streets."

Observation made by clients during a focus group

"Service manages to put people at ease and reduce stress."

Remark made by partners during a stakeholder event

"Clients are becoming too dependent on the charity; aim to help clients to be independent."

Comments from independent consultant's report

He observed that there is strong support and appreciation for face to face advice from a named adviser. Clients very much appreciate the personal support and time given by advisers.

Strategy day extract

A proposed membership scheme was discussed. We elected to invite clients to become associate members (at a small annual fee), to give them priority treatment during exceptionally busy times. We thought it would sharpen our relationship with clients by bringing them into the charity by creating a structure for regular feedback and consultation. Clients who are members receive a folder that we ask them to use for paper storage, such as tailored self-help guides and information sheets.

Summary of interviews with funders

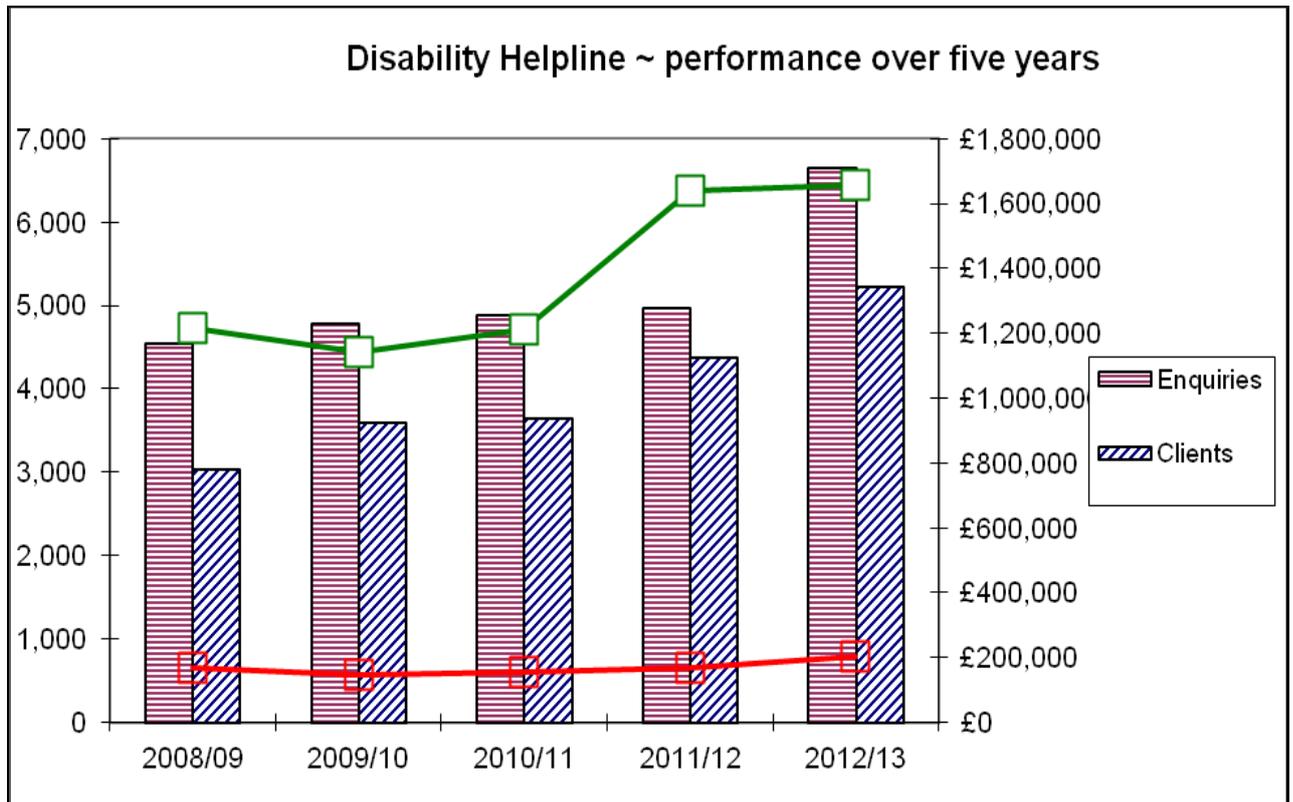
Funders say this work has become a valuable service to clients. Comments were made to the effect that our work is encouraging individuals to become more involved in managing their lives, leading to improved local health and well-being.

Other evidence

In 2011, clients and the local MP nominated us for the Queen's Award for Voluntary Service. This was awarded in recognition for our outstanding work in the local Community. In addition, we were the first organisation in the country to achieve the DIAL UK Quality Mark. The quality of our services is reinforced by our Advice Quality Standards, Disability Ticks Symbol, Skills Pledge and Disability First Core Standards. All require rigorous ongoing assessment every one or two years to retain them and this includes updating our policies and procedures.

The following information is a summary of achievements achieved over the last five years:

	2008/09	2009/10	2010/11	2011/12	2012/13
Enquiries	4,530	4,777	4,873	4,962	6,649
Clients	3,020	3,591	3,639	4,370	5,219
Generated	£1,214,547	£1,140,010	£1,213,430	£1,638,785	£1,658,796
Expenditure	£166,589	£145,633	£155,586	£169,962	£201,119

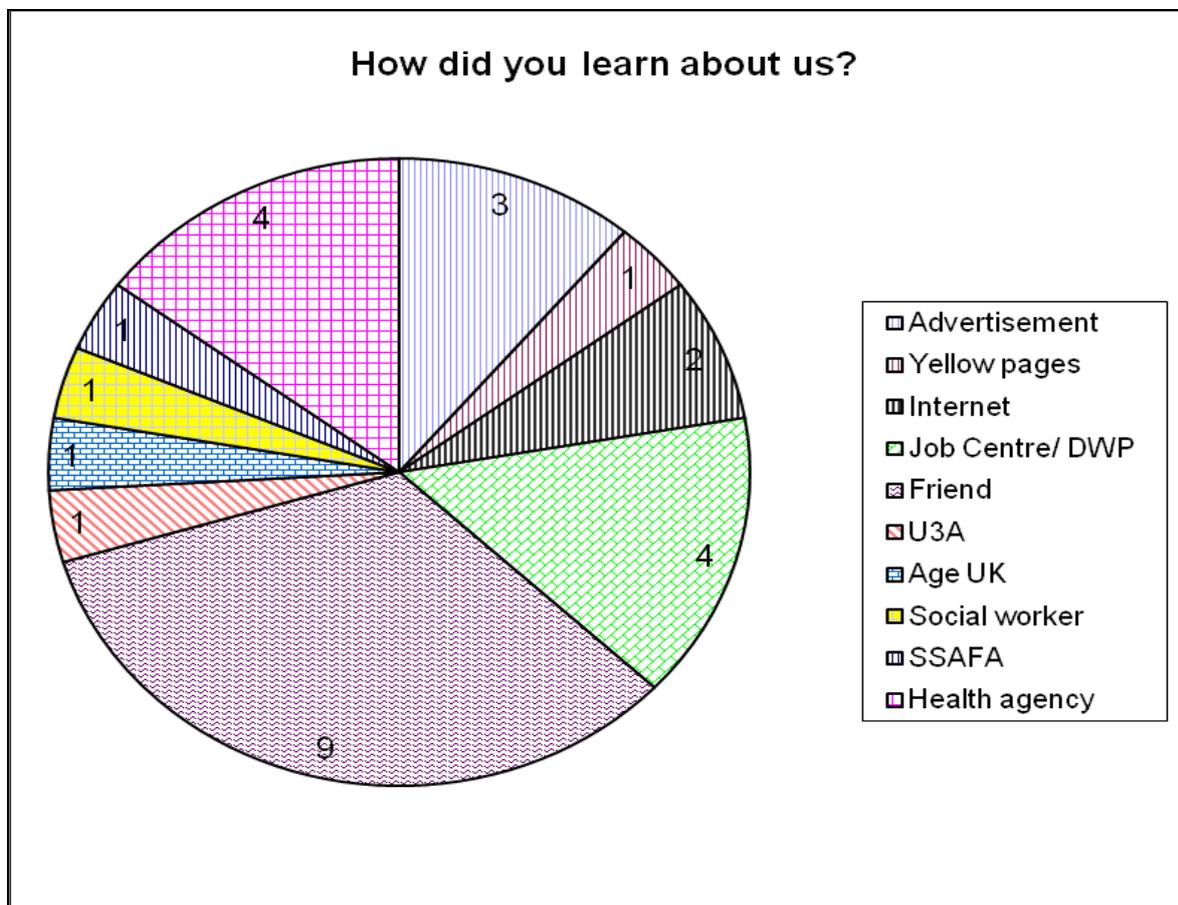


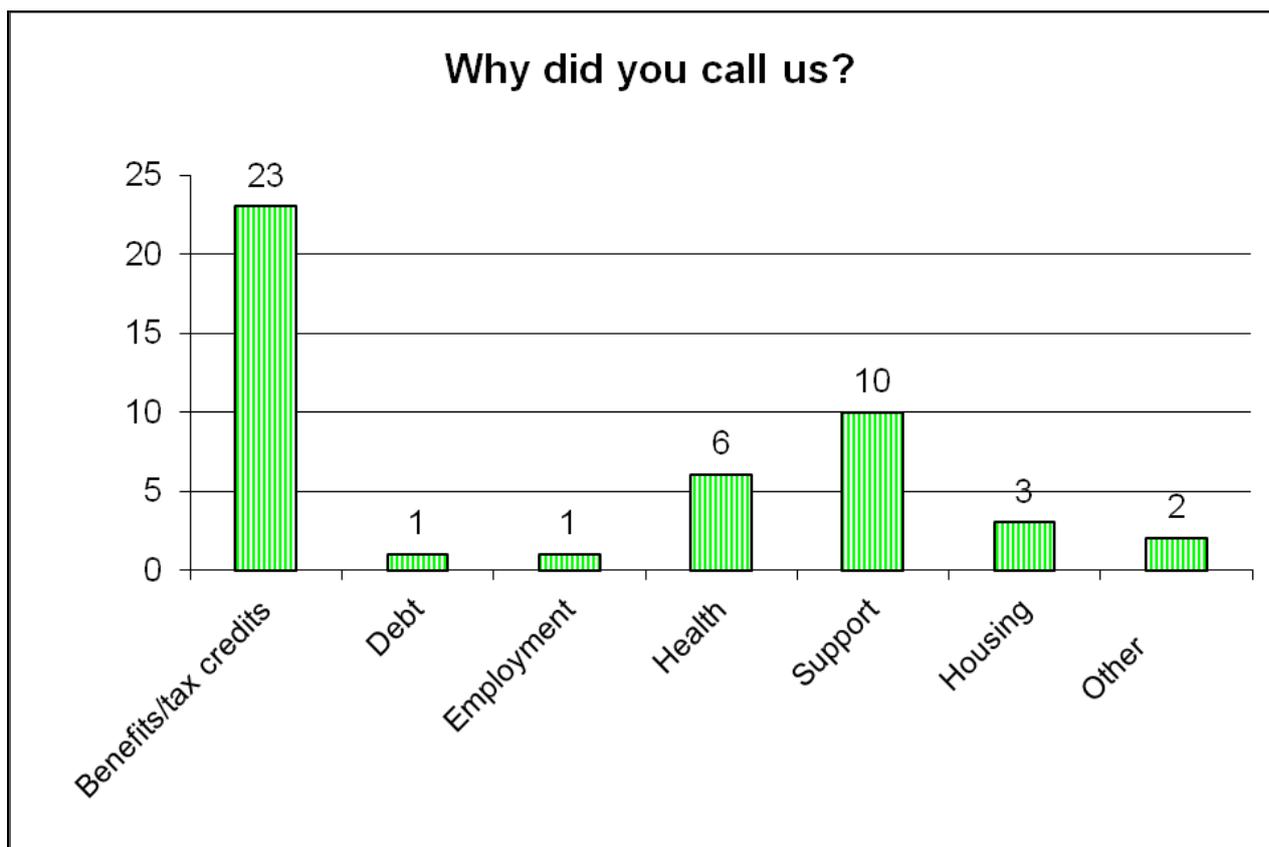
There Remains a Need

Clients' postal survey results

This section displays two graphs, compiled from data gathered from the responses. These responses clearly show a strong need still exists for disabled people and carers in West Lancashire. There are also quotes from questionnaire respondents. These show that there remains a strong need for our charity.

Although we advertise our services quite widely within the Borough, we see that most people learn about us from their friends. This is evidence that we have an excellent reputation and that our clients have confidence in our well-established charity. Over half of our services tend to be welfare rights-related.





Excerpts from clients' questionnaires

"I am very happy as the problem of filling in forms is very difficult for my wife and myself. Thank you for your service. Please, please continue."

"I am more than satisfied with the help and assistance I received and would recommend them to anyone who doesn't know which way to turn with regard to their disability or benefits."

Observation made by clients during a focus group

"Support for form filling is absolutely essential."

Remarks made by partners during a stakeholder event

"Maintain expertise."

"Fund this work!"

"Maintain high customer standards."

Comments from independent consultant's report

The charity is a strong and established organisation with a robust track record which continues to make a difference. It is well respected and highly valued by its clients, who say there continues to be a need for the charity. There is high demand for the work of the organisation. There is strong degree of confidence and commitment to the charity's core purpose; its track record proves it can expand its services if it receives more funding.

Strategy day extract

The Social Fund is being replaced. Our statistics show there remains a need for this type of financial support. We decided to obtain a database of funders that fund individuals only and do searches for clients that need to access emergency funding for specific items. We now download the application forms for them and the volunteers help clients to complete them. We have included this new activity in our new project.

Summary of interviews with funders

Funders said that the pilot has been a great success in that it has afforded members of the public more options for health gains and improvement choices, such as employment opportunities, income maximisation and debt avoidance. They also point out that as we specialise on focusing on the holistic approach through our partnership-working, we have substantially helped customers by providing an enviable customer service. Funders are keen to continue working closely with us and look forward to collaboration in new projects.

Other evidence

There is greater poverty, higher unemployment and health inequalities than in previous years. There is increasing demand for our specialised services to offer people health gains and improvement choices, such as employment opportunities, income maximisation and debt avoidance. The welfare system is changing, becoming more complicated and harder for people to meet the new criteria. Personal Independence Payment replaced Disability Living Allowance in April 2013 and Housing Benefit changes were introduced.

The new Universal Credit is set to come into force in October 2013, replacing a number of other benefits. We have a proven record as a learning organisation that consistently meets challenges. Clients told us they are distressed and vulnerable; they need our expertise even more. This project will give us time to move to a more diversified sustainable funding base.

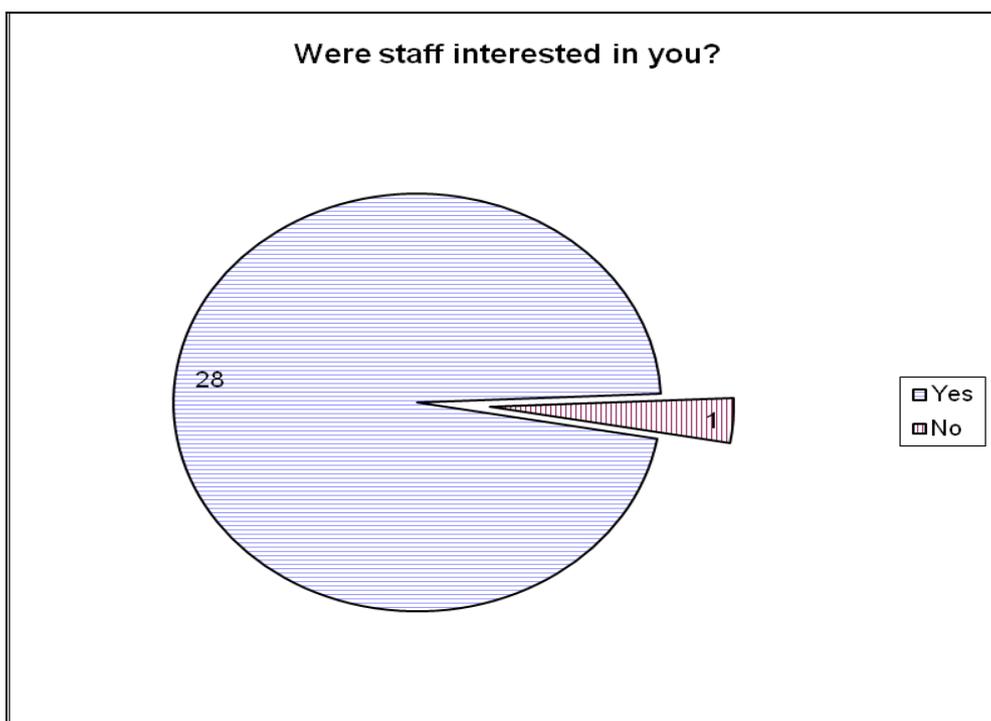
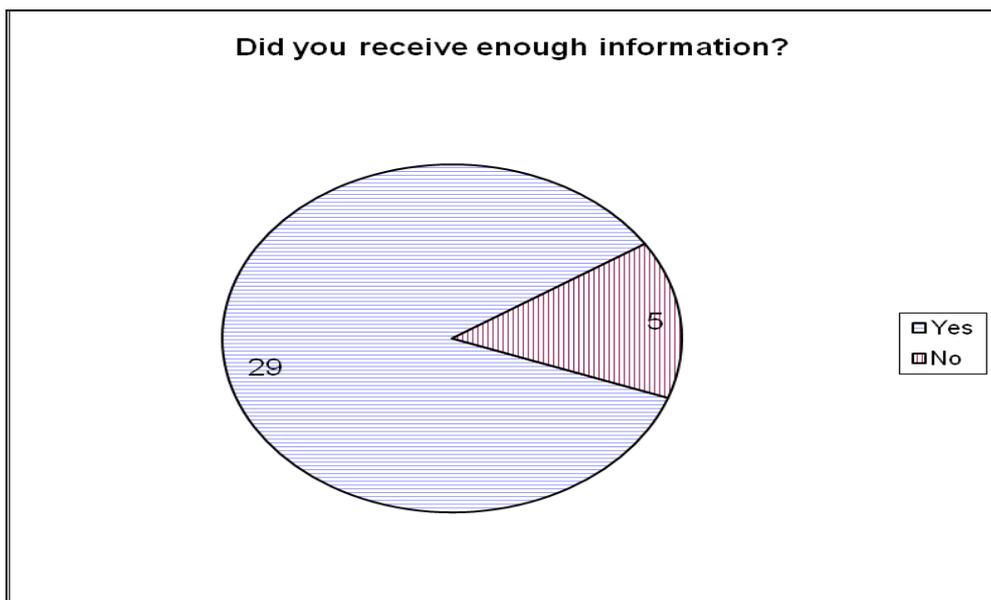
This year's statistics show demand is rising. Our client questionnaire findings last year show that about 70% of clients say that we make a very positive difference to their peace of mind and well-being. About 58% of clients say that we help them to improve their financial position; our self-help tools will help us to focus on the remainder.

The Office for National Statistics (2011) shows that there are more people in West Lancashire who need our services than the national average. For example, 9% or 9,960 of West Lancashire's 110,685 people have disabilities; the national average is 7%. There are 6,984 people in ill health in the Borough, or 6.3% of the population (national average 5.4%). There are 13,426 carers in West Lancashire, 12% of the population (national average 10.3%). There are also 3,066 mental health service users in West Lancashire; this represents 2.8% of the population (national average 2.4%). The need for our service is greater in West Lancashire than the UK average. We also know from our own records that some clients are already "sinking without a trace."

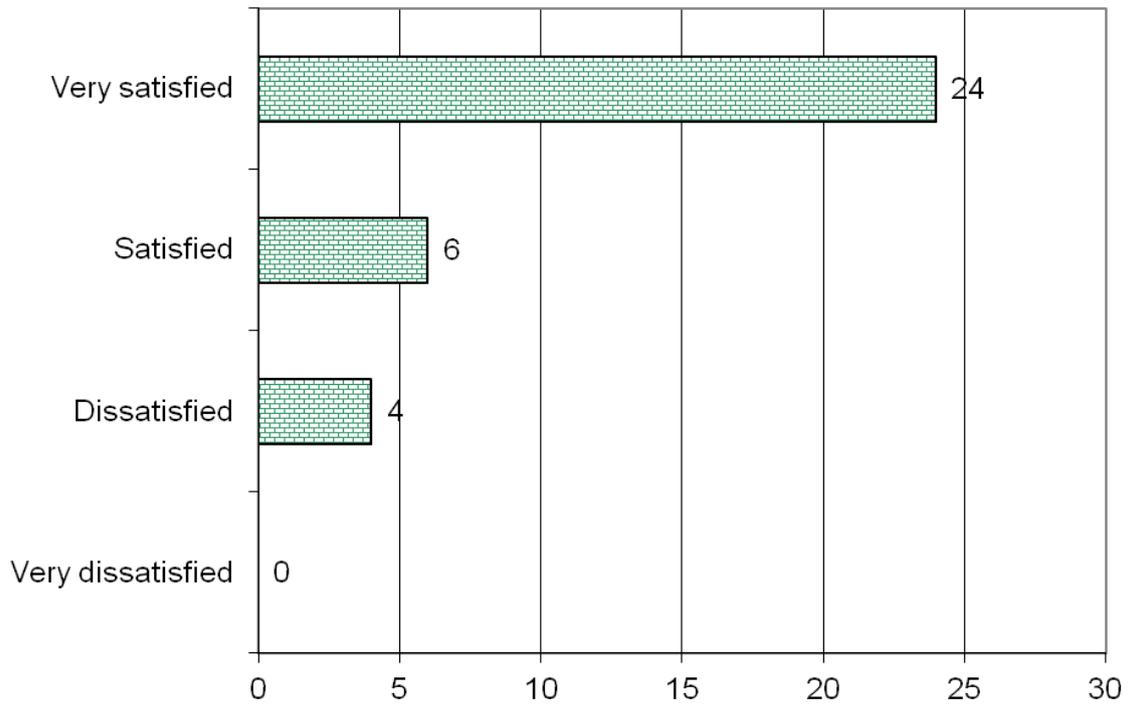
Our consultant carried out a comparison analysis to look at how the project fits into other local advice provisions. This helped us to identify our distinctive role and expertise in providing services that reaches out and supports disabled people, helping them to overcome barriers in accessing other services. Moreover, only we have tried and tested self-help tools that successfully promote clients' independence to move away from over-reliance on the State.

What Has Worked Well

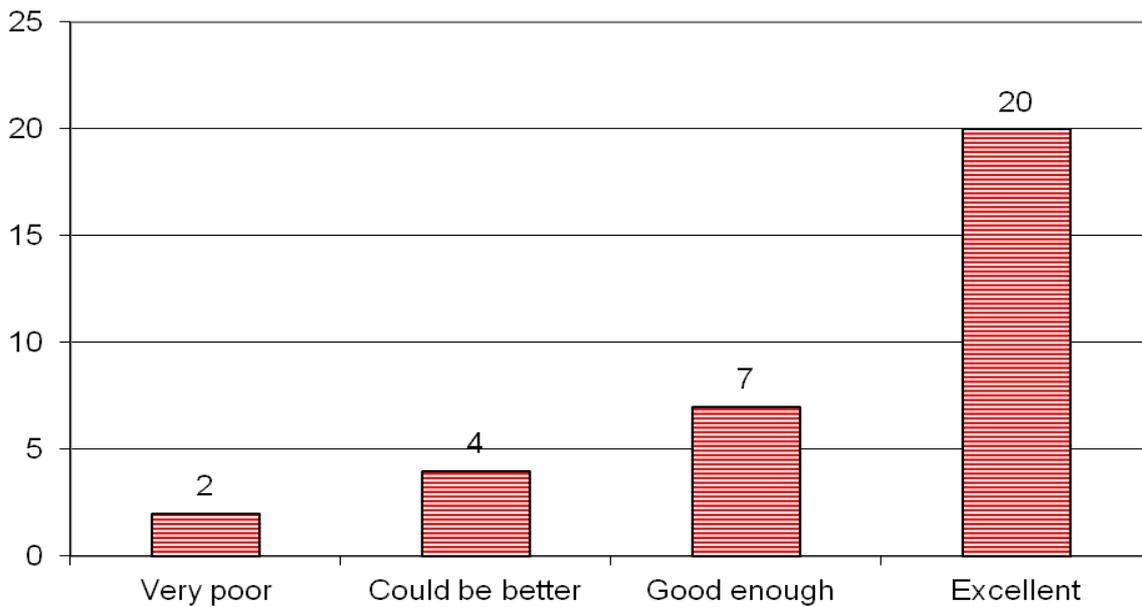
To highlight which parts of our services have worked well, we are again illustrating data from clients' questionnaires to produce six graphs in this section. The responses show that the vast majority of clients receive the right quantity of information to answer their enquiries. Nearly every client surveyed said our team was interested in their case and about 90% said they were satisfied with the way we dealt with their problems. Almost all clients agreed that our team have the skills to help them.

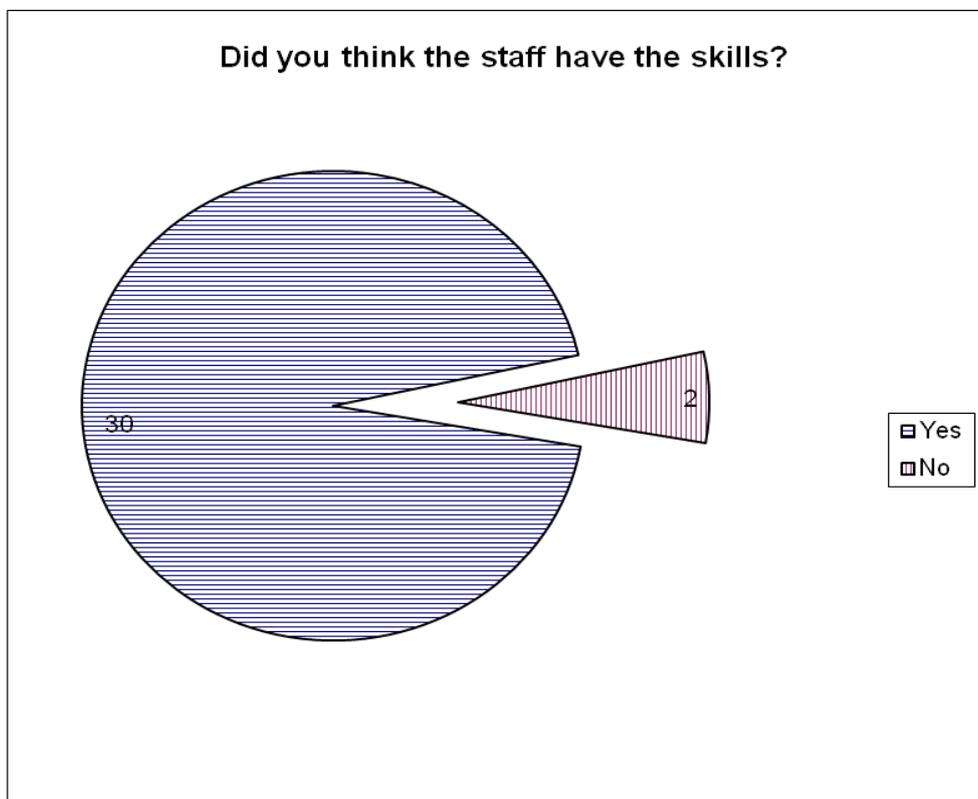
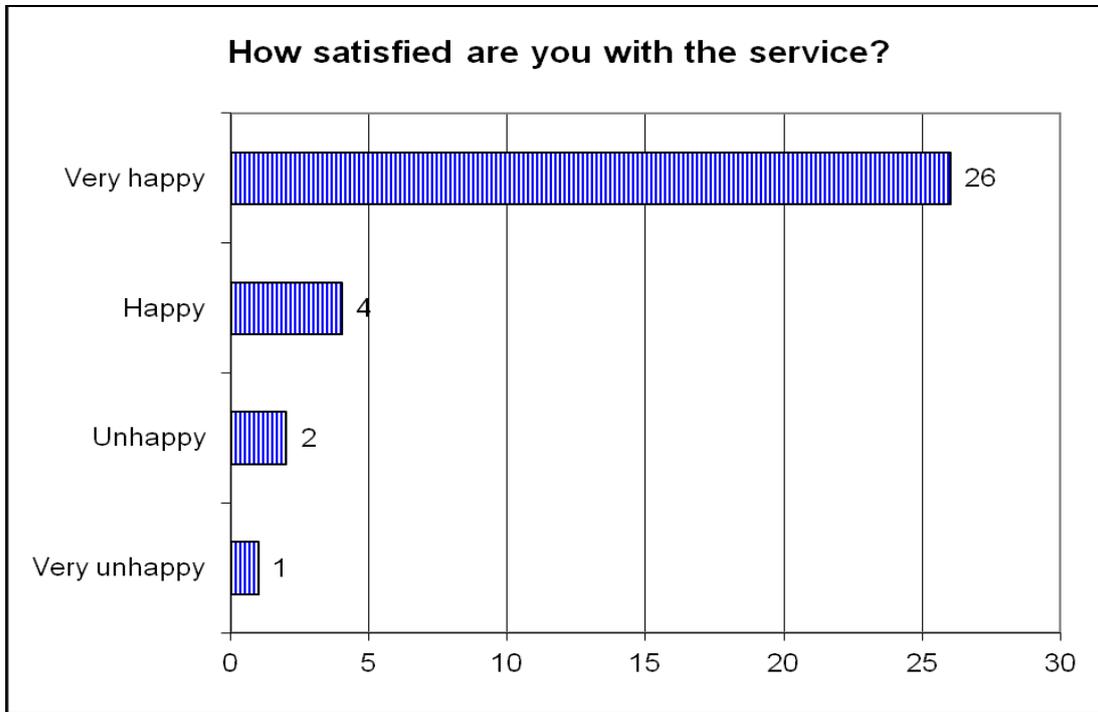


How satisfied are you with the way the staff dealt with your problem?



What do you think about the Help?





Excerpts from clients' questionnaires

"Everything was explained in a way that I could understand."

"Very good advice and very helpful."

"We can't sing their praises high enough."

"Everybody was very friendly".

"Only to say that the person I spoke to was very pleasant and very helpful."

"Helpful and friendly advisers, who are knowledgeable and polite. It's nice to find someone that doesn't judge me or my disability."

"We were happy with the service and could find no fault."

Observations made by clients during a focus group

"It is quite well known. It works mainly through word of mouth communication."

"Important to have a range of ways of using the service – don't go over to the internet."

"Really valuable, having a named worker who is dealing with my case."

"The service can give a range of support."

"Strong support for face to face advice work."

Remarks made by partners during a stakeholder event

"It supports the community."

"High knowledge level."

"Impartial."

"Supportive/caring ethos."

"Flexible."

"Good reputation."

"Dedicated."

"Volunteer-based."

"Well-known."

Comments from independent consultant's report

He observed that we have been very successful in the past at winning block funding and grant aid to support our work. He sees a danger of some complacency and being taken for granted. Relationships, especially with core funders needs to become more strategic and focused. He suggests that that regular contact with core funders could be a way into other partnerships.

The consultant's review of the charity indicates that it is in a strong position to move forward. It has a clear role and is in great demand from its client group. It has built up a strong reputation and track record. It has in place effective arrangements for governance, management and resource control.

Strategy day extract

We know that we have a very successful track record in the delivery of outreach stations in the Community. There is very strong evidence that our pilots in Ormskirk Hospital and West Lancashire Carers Centre should become outreach station projects. We agreed to turn our impetus to carers and mental health sufferers in the Borough by working in partnership with the Hospital and the Carers' Centre in the delivery of our services.

Summary of interviews with funders

Funders are very positive indeed about the charity. They see it as an organisation that is hard working, well regarded and plays a valuable role. All of their contacts with the organisation are positive: as examples, speed of response, client follow-ups and personal client care.

Their overall view is that we are a well-respected organisation, well run and that always delivers. They regard the Manager as "excellent" and see us as a very solid and safe organisation.

Other evidence

The Board has extensive experience and expertise in developing the charity at the whim of external market forces. We have developed significantly to meet increased demand for our unique services as well as maintaining the high standards our quality marks lay down.

The Manager has operational day to day responsibility and meets with the Board about eight times each year to provide operational reports as well as updating the Board on the Business Plan's performance indicators. He holds an MSc in Management Development, other postgraduate management qualifications and professional memberships of 2 management institutes, reinforcing his ongoing learning. Many of our projects are so successful that they have efficiency and effectiveness gains.

We have a very successful track record in recruiting the right staff to deliver client outcomes. Our high performance working strategy of rigorous recruitment and selection, high quality training, engagement and reward all combine to ensure our turnover is minimal and that we have a strong productive team.

The staff members and volunteers have supervision from the Manager every quarter and appraisals annually. These are processed into a central training plan for the charity. There are regular team meetings once a week, when cases are discussed and ideas shared. The trustees support the Manager in turn.

The Treasurer, who is a retired Public Sector Accountant, reports on income and expenditure to the trustees each quarter. The Manager will have targets to achieve for fund-raising to support the project. Our financial procedures are reviewed as necessary.

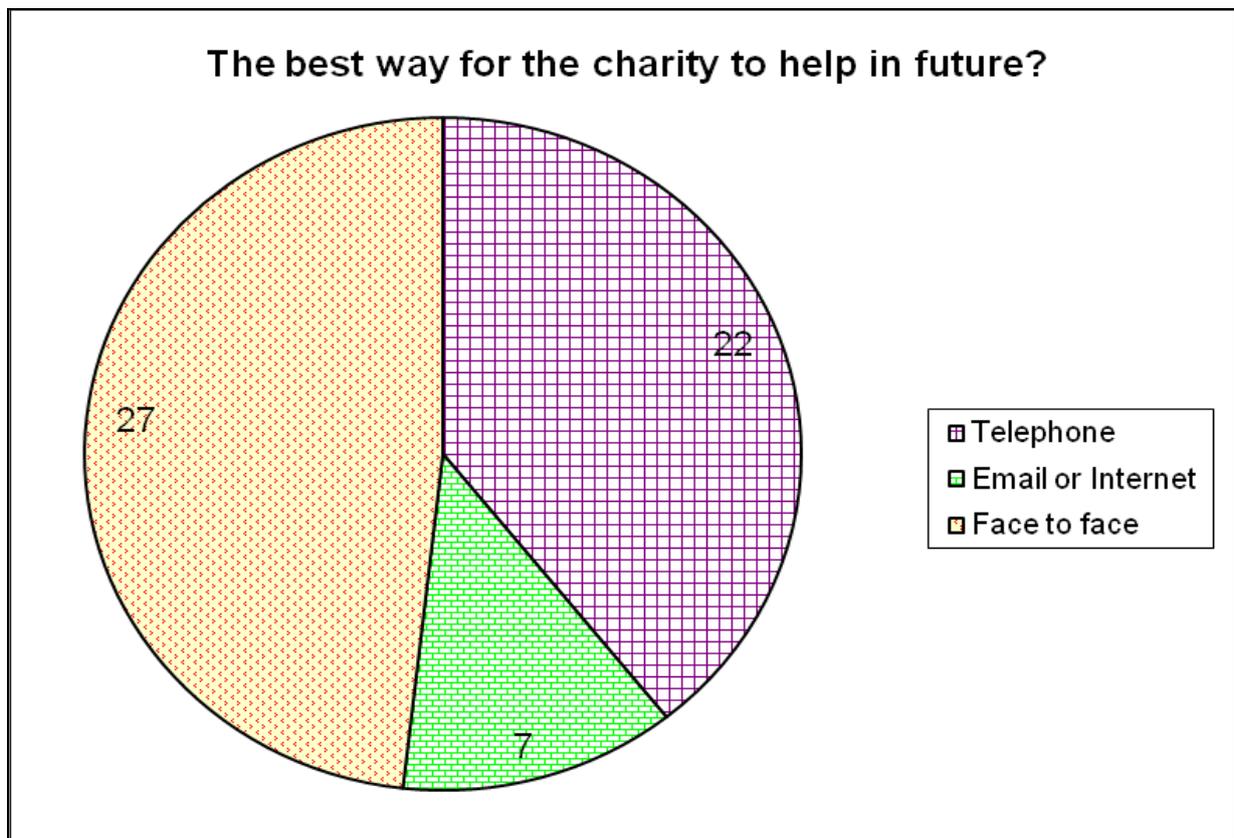
The trustees have implemented a risk management strategy, which comprises an annual review each spring (2013 is available), of the risks that the charity may face, the establishment of systems and procedures to lessen those risks and the implementation of procedures designed to minimise any potential impact on the charity should any of those risks become apparent. A SWOT analysis was undertaken and then a risk analysis was done from the threats identified.

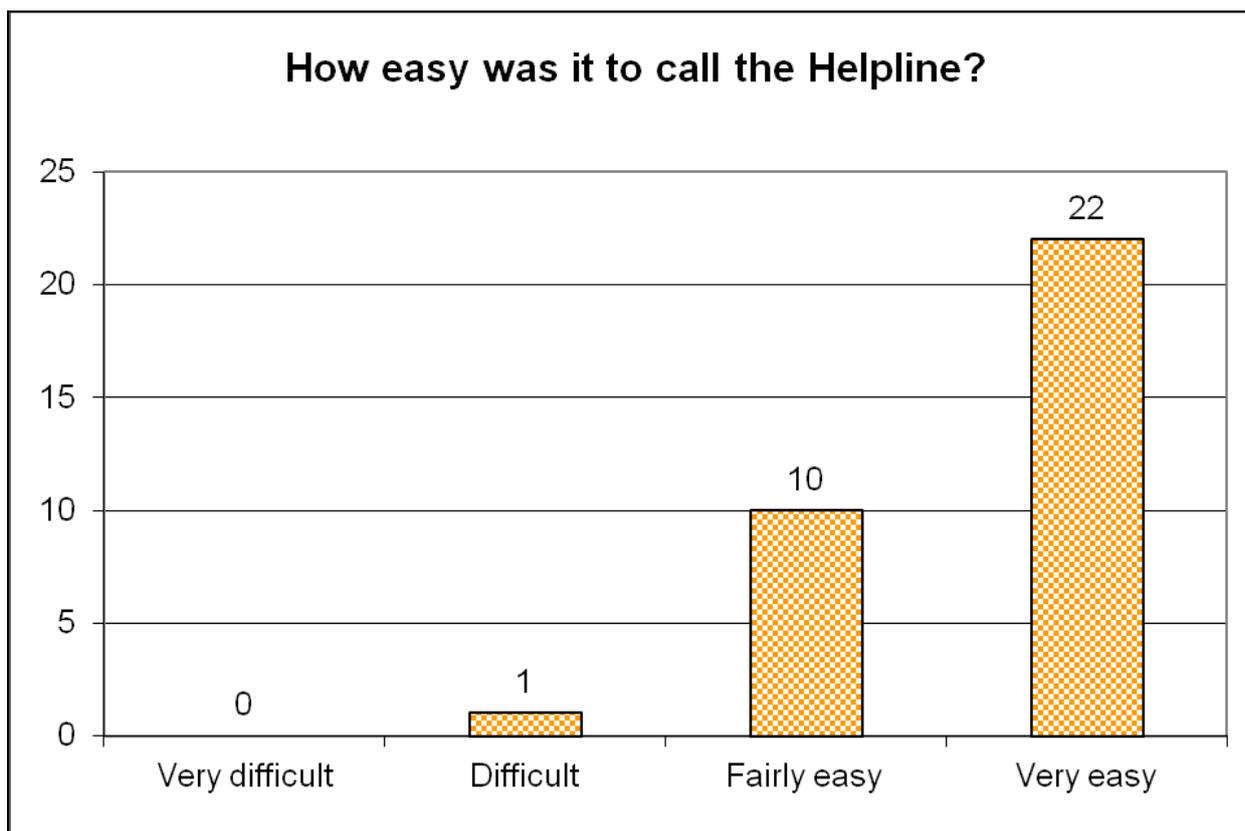
Several projects we ran in the past realised sustainable development even after they ended. We can achieve the same aims with this project. For example, some clients will receive lifetime awards that will continue after this project and this will help them to stay out of poverty. We offer video conferencing from the office to clients for Tribunal representation. This is less stressful for clients and is more environmentally-friendly. Some of our volunteers we have very recently recruited have low confidence and social skills. Based upon our track record, we will help them to blossom and they will move on to paid employment where they will continue to thrive.

What We Could Do Better If We Receive More Funding

To highlight which parts of our services have worked well, we are again illustrating data from clients' questionnaires to produce two graphs in this section. Roughly half of our clients favour our services being delivered to them face to face. Clients are able to contact us by Freephone, email, Mincom, drop-in surgeries and soon, on our website, as we want to ensure we are accessible to as many clients as possible.

We are taking our service to the Community so that we are more accessible and proactive; clients and partners told us that at times, our telephone lines are busy and outreach surgeries are a way of ensuring hard-to-reach clients can access our services.





Excerpts from clients' questionnaires

"Problems with not being phoned back."

"It was not easy to speak to staff member due to them being busy."

"We had to call into the main office and I felt the disabled parking left a lot to be desired; it was quite a way from the office and you needed somebody to collect voucher for parking."

"The Helpline was very good but could get the ball rolling a lot sooner than 4 weeks - because when you phone, you need help right away, not in 4 weeks."

"Everyone was supportive, helpful and professional but with the service so busy, the long wait for appointments is a problem."

"Staff and paperwork great. Only thing to improve on is turn around time. I did not plan to be so poorly so a quicker response would have helped personally and financially."

Observations made by clients during a focus group

"The charity should encourage users to donate to the service."

"It could do local public fundraising."

"The Helpline could have a greater role in educating the public about disability and overcoming stigma and prejudice."

"Personal contact is vital – too many organisations are moving away from it."

"Perhaps the Helpline should feedback into policy-making and let policy-makers know the impact of their decisions and how policies are working."

“Giving people time is key.”

“The service is good at helping people to identify options – this encourages independence.”

“The organisation’s name should be reviewed. Any new name must be clear and simple.”

“The building is a problem – access/hard to get to”

Remarks made by partners during a stakeholder event

“Needs to work with the new CAB outlet.”

“Opportunities to form consortia with other agencies.”

“Developing specialist volunteer roles.”

“More formal and informal partnerships.”

“Project working”

“Changes in the welfare benefit system could be a chance to demonstrate expertise/leading position.”

Comments from independent consultant’s report

The charity could consider the following ways of developing its services by:

- finding ways of making the service more accessible and proactive
- greater use of outreach and delivering in partnership through other organisations
- offering a broader range of services to people with disabilities that reflect the whole range of issues that confront people with disabilities and carers.

The charity should decide its position from the following:

- stay as it is – work hard at getting funding and hope for the best
- consolidate and develop
- transform – build on what works and take the organisation forward.

The following four issues will be critical in future success:

- Retaining confidence - the charity needs to recognise and celebrate the difference it makes to clients’ lives. It needs to be able show the positive outcomes it delivers in terms of health improvements, supporting independence and clients’ economic circumstances
- Avoiding complacency - the charity operates in a fast changing sector. ‘Business as usual’ is not a viable longer-term strategy. It needs to be able to identify how clients’ needs are changing and how changes in policy, funding and other factors could impact. The staff and trustees need to set aside time on a regular basis to review the organisation and identify future opportunities
- Marketing the profile - it needs to ensure that it has a public profile that is relevant, modern and well known. The client surveys and partners’ focus groups show that there is much goodwill towards the charity. This support should be built on and used
- Being outward going - strong links need to be developed with partner organisations and other statutory and voluntary organisations. Such partnerships links will raise the organisation’s profile and may well lead to future opportunities.

The following fourteen specific recommendations were made, also showing the actions taken by the charity so far:

<i>Consultant's Recommendations:</i>	<i>Actions Taken So Far:</i>
Forthcoming changes in the welfare benefits system could be an opportunity to develop a training and support programme for other agencies	<i>Contacted other advice agencies on 03/12/12 to invite them to send some of their advisers to our welfare workshops.</i>
Ways need to be found of making services more accessible and proactive	<i>The Board and team agreed on a new service model at the Strategy Day on 12/09/12 of doing more outreach work in health centres and making links with the Clinical Commissioning Group in partnership with GPs</i>
Greater use of outreach and delivering in partnership should be considered	<i>Established partnership outreach agreements with Ormskirk Hospital and West Lancashire Carers' Centre on 27/09/12 On 17/04/13, we entered into discussions with the Clinical Commissioning Group to finalise our partnership in working with GPs</i>
The charity should consider offering a broader range of services to disabled people and carers that reflect the whole range of issues that confront them	<i>On 12/12/12 at the EGM, we agreed to move into budgeting/financial management, helping clients secure grants, self-help tools, welfare workshops and training & development sessions</i>
The charity will have to rely upon an income mix made up from various sources	<i>On 12/12/12 at the EGM, the Board implemented an Income Base Plan to diversify our funding from numerous sources</i>
Needs to identify ideas for projects that relate to the interests and objectives of potential commissioners	<i>The Board and team identified several project ideas at the Strategy Day on 12/09/12; as examples – self-help tools, housing-related advice work, mental health, training placements, grant applications, older people's support and budgeting/financial management</i>
Needs to ensure connection into adult social care developments and can identify potential roles in developments like personal budgets	<i>Joined Insight Network on 29/10/12 and Central Lancashire Provider Forum on 22/11/12</i>
The charity needs to find potential partners for joint working, collaborative ventures and sub contracting arrangements	<i>Our Partnership group on 27/09/12 identified opportunities. We have begun this; for example with Lancashire West CAB on 19/12/12 for Advice Services Transition Fund bid</i>

The Board must monitor and explore the potential for charging for some services	<i>On 12/12/12 at the EGM, the Board established an associate class of membership for clients accessing the charity's services for £24 a year</i>
As a medium-term possibility, management should explore a structure where one or two existing staff are allocated (and rewarded for), a lead responsibility alongside their existing duties	<i>Staff structure change approved by trustees following a Board meeting on 13/03/13 to support the Manager in volunteer development, giving him more time to build up the income base</i>
Time needs to be taken to build relationships with new potential commissioners such as the new GP Clinical Commissioning Group (CCG)	<i>Established contact with Lancashire County Council Commissioning on 22/11/12, West Lancashire Borough Council on 03/12/12 and the CCG on 17/04/13</i>
A marketing and communications strategy should be developed	<i>Marketing sub group finalised this on 06/12/12 and trustees approved this during a Board meeting on 16/01/13</i>
The charity should review the appropriateness and usefulness of its name	<i>We registered our new working name "Disability Advice West Lancs" with the Charity Commission and Registrar of Companies on 12/12/12; trustees also approved new image and website on 12/12/12</i>
the Board needs to agree upon the future direction	<i>At a Board meeting on 12/12/12, trustees agreed to apply for a three-year grant for our new "Advice Self-help," Reaching Communities project</i>

Strategy day extract

One area we talked about was supporting disabled people into paid employment. We can realise this by increasing clients' self-confidence to make informed life choices about their independence. We will use the training and development sessions in the new project to achieve this - examples being assertiveness, disability awareness, customer care, team-building and CV writing.

Summary of interviews with funders

Funders see the organisation having an increasingly important role. They are very keen to link up services in West Lancashire and would encourage the charity to work more closely with other advice agencies. Working together may be important in defending concerns about service duplication.

Other evidence

Clients have told us they want welfare workshops, training and development sessions and to be involved with developing, running and evaluating the project. Moreover, only we have the tried and tested self-help tools that are proving to be so successful in moving clients towards independence.

Last year, West Lancashire Local Strategic Partnership (or LSP), highlighted mental health and carers as two areas of most unmet need. It recognises that our project will contribute vital resources in helping reduce health inequalities in the areas of mental health and carers. The NHS's Health Profile (2012) shows that its priority in West Lancashire is tackling health inequalities and early intervention to improve health and well-being outcomes. We will share the project's findings with appropriate national organisations we have strong links with and they in turn can cascade this feedback to local groups throughout the country.

The West Lancashire CCG has invited us to apply for some funding towards our services. Since we submitted our outline proposal earlier this year, we have had over 40 new paying members and this is growing. They receive a folder that we ask them to use for paper storage; this further encourages self-help and helps us to manage our workload even more. Our pilot work for this project continues to be successful, which strengthens its need even further.

A key issue facing the charity is how to deal with demand at a time of shrinking resources. All indications suggest that changes in the benefits system and demographics will lead to demand for the charity's work increasing. It needs to continually review its service model to ensure that it is relevant, accessible, meets clients' needs and follows best practice in the advice sector.

Future Strategy

Strategy day

In September 2012, we held a strategy day in which we heard the consultant's report. After discussions, we decided to transform the charity completely, to build on what works and take the charity forward. We accepted this would mean a radical change towards developing new service delivery models, changing the style of our work, culture, role and identity.

We accepted the consultant's recommendations in the following broad points:

- Produce self-help systems to simplify clients' journeys and clarify their responsibilities to reduce dependency, giving us more time to manage our work
- Introduce an associate client membership scheme and folder for paperwork storage
- Ensure we are tender-ready for commissioning
- Become more accessible and proactive for clients in outreach stations
- Change our identity to Disability Advice West Lancs to transform the charity – build on what works and take the organisation forward.

Sub groups

We then formed six groups, consisting of trustees, volunteers, staff members and clients to finalise the details of our agreed strategy.

Extraordinary General Meeting

The Trustees then called an Extraordinary General Meeting in October 2012 at which members passed the following special resolutions based upon the sub groups' recommendations:

- Trade as Disability Advice West Lancs
- Establish an associate class of membership for clients accessing the charity's services for £24 a year
- Become a charitable incorporated organisation
- Change our objects to include carers in our remit.

“Advice Self-Help” Reaching Communities project

In November 2012, the Charity Commission approved the use of our new name. We produced and piloted the self-help tools from March this year, with very positive results. We implemented our associate membership scheme for clients the same month; over 40 clients have signed up so far. We established a meaningful dialogue in April with West Lancashire CCG. We are confident that this will lead to future projects, such as taking our services to health clinics and reaching other communities that way.

This evaluation has provided the evidence and user input from clients, partners and stakeholders in the design of this new project, our three-year Business Plan and Reaching Communities bid. Our research shows that there is a very strong need for our services to deliver significant outcomes in terms of health improvements, income maximisation, money management skills and promoting independence. Our track record shows we have the capacity to deliver what we have promised and with efficiency and effectiveness gains too.

Project outcomes

In order to make clear our aims over the next three years, the Board agreed to establish two outcomes:

Outcome One:

Clients on low incomes will experience less stress and anxiety as a result of financial advice leading to improved well-being

Outcome Two:

Disabled people and carers will have increased self-confidence to make informed life choices about their independence.