

Executive Summary

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The charity has been delivering services successfully for more than thirty years and has become well-respected locally	2
Using money awarded by the Big Lottery Fund, the charity employed a consultant to review the strategy for the next few years.	3
The charity agreed five main actions a) New self-help guides b) Associate membership c) Being tender-ready for commissioning d) More accessible in the community e) Change our identity	3
To meet the needs of the future the charity has plans in force as follows – a) To cope with legislative changes b) To develop outreach services c) To introduce new ‘self-help’ tools d) To promote the membership scheme e) To review its strategy for sustainability	4

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Introduction

Background

In 1981, a group of volunteers interested in helping people with disabilities started this charity. Its mission is to provide high quality, confidential information, advice and support to people with disabilities and their carers in West Lancashire, which enables them to make informed choices about how *they* wish to live *their* lives. For instance, people make choices about Community Care, equipment, holidays, welfare rights, Tribunal representation, budgeting and employment.

In 2011, clients and the local MP nominated the charity for the Queen's Award for Voluntary Service. This was awarded in recognition for outstanding work in the local Community. In addition, it was the first organisation in the country to achieve the DIAL UK Quality Mark. The Advice Quality Standards, Disability Ticks Symbol, Skills Pledge and Disability First Core Standards reinforce the quality of its services. All require rigorous ongoing assessment every one or two years to retain them.

A board of trustees (aka directors) – currently eight strong – heads the charity. The Board employs a full-time Manager who supports the six part-time paid staff and fifteen volunteer advisers (please see the staff structure in Appendix A). The volunteers provide around 5,500 hours each year.

In a typical year, the team responds to about 6,500 enquiries from 5,000 clients. The small welfare rights team of staff and volunteers generates over £1.5 million in welfare benefits income for vulnerable people in need and suffering from financial hardship and poverty. The team achieve this by helping clients by undertaking income assessments, form completion and by accompanying clients at Tribunals.

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, 9,960 of West Lancashire's people have disabilities; there are 6,984 people in ill health in the Borough; there are 13,426 carers in West Lancashire, there are also 3,066 mental health service users in West Lancashire.

Review of strategy

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.

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. Please refer to our website www.dawl.org.uk to peruse the consultant's report in full.

The charity agreed the following actions:

Produce new self-help guides that simplify clients' journeys and clarifies their own responsibilities to reduce dependency on others and give us more time to manage our work	Started March 2013 We will refine these guides in response to comments from our clients
Introduce an associate client membership scheme and folder for paperwork storage	Started March 2013
Ensure we are tender-ready for commissioning	Appropriate staff members will attend training in June 2013
Become more accessible and proactive for clients in GPs' surgeries	Letter sent in 2012 to Chairman of CCG offering services
Change our identity to Disability Advice West Lancs so we are perceived as the lead local expert body for disabled people and carers because of the health outcomes we deliver.	We registered our working name with the Charity Commission and Registrar of Companies in 2012

The Future

Coping with legislative changes

The welfare system is changing, becoming more complicated and harder for people to meet the criteria; Personal Independence Payment came into effect in April 2013, as did Housing Benefit changes; the Universal Credit is expected to come into force in October 2013.

The charity is now at a critical point of its development and it has used stakeholders' views to design new services to meet the changing needs of our clients. Following a successful pilot, we will begin to offer our new self-help services, which will increase clients' self-confidence and help them to move towards independence.

With the introduction of Personal Independence Payment, we will no longer be able to use our Alternative Office status as widely as this is not covered in the new legislation. This means that we will not be able to win benefits for clients as quickly.

Outreach stations

We plan to continue offering outreach services in the West Lancashire Carers' Centre and Ormskirk Hospital. We will deliver our services from the office, in the homes of housebound people and in the Appeals Service's locations at Liverpool and Wigan. With the agreement of the Appeals Service, we hope to increase the use of video conferencing from our office. We will also offer to provide services at health clinics.

New self-help tools

There is a need for clients to take more active roles in their own affairs as many of them are too dependent upon others. We have piloted our new self-help guides, which explain clients' choices at each stage of their journeys, from income assessment right up to Tribunal representation. The self-help guides also very clearly state clients' responsibilities at each stage. Our pilot feedback shows that this encourages independence and helps to reduce our workload.

Clients' feedback from our training and development sessions will help us to assess their self-confidence. Examples of these sessions include assertiveness, disability awareness, customer care, team building and CV writing.

Clients will also feedback from our welfare rights workshops and this will measure our impact on their independence. These sessions will also help us to educate clients. This will help them in proactively making their own decisions and our new self-help guides will help to reinforce their move towards independence and away from dependency on others.

We have adopted an in-house outcomes tool to measure clients' progress and our Trustees, team and partners will use this to develop and improve services.

New membership scheme

We invite clients to become associate members (at a small annual fee), to give them priority treatment during exceptionally busy times. The membership scheme will bring clients 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; this further encourages self-help.

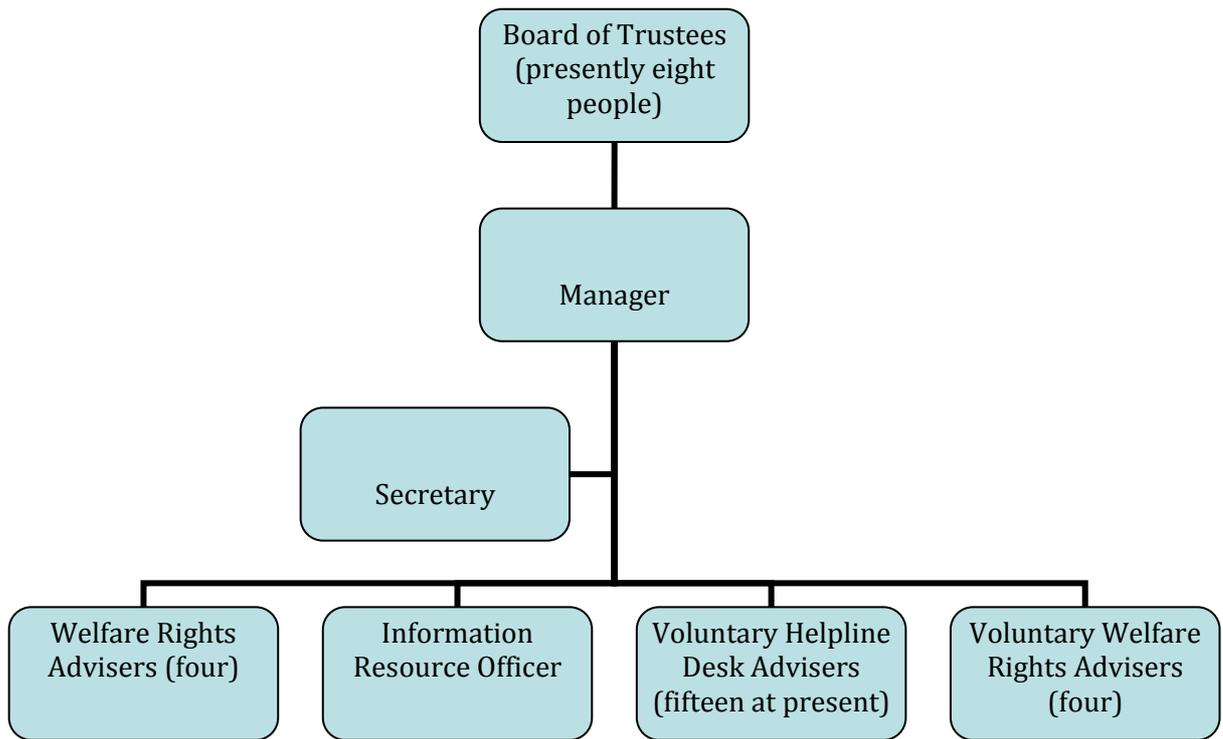
Sustainability

The charity will continue to implement its long-term strategy to enable continuity from summer 2013:

- Concentrate on our partnership-working with other organisations
- Market our video conferencing facilities to other organisations for a reasonable fee
- Maximise volunteer recruitment and training
- Secure our remaining income from other sources, such as grant-making trusts
- Maximise our local fund-raising capacity

The charity is considering the development of a payroll-giving scheme with local employers and is concentrating on refining its system with a university in the Borough before approaching others.

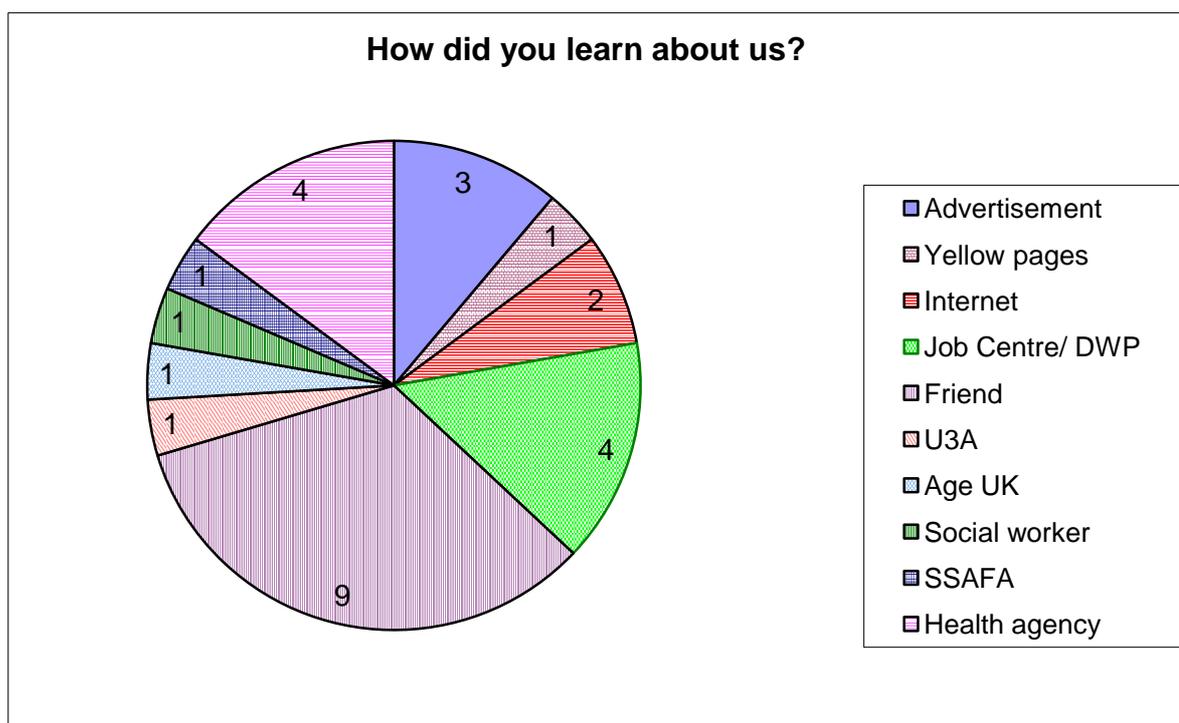
Organisational Structure Appendix A



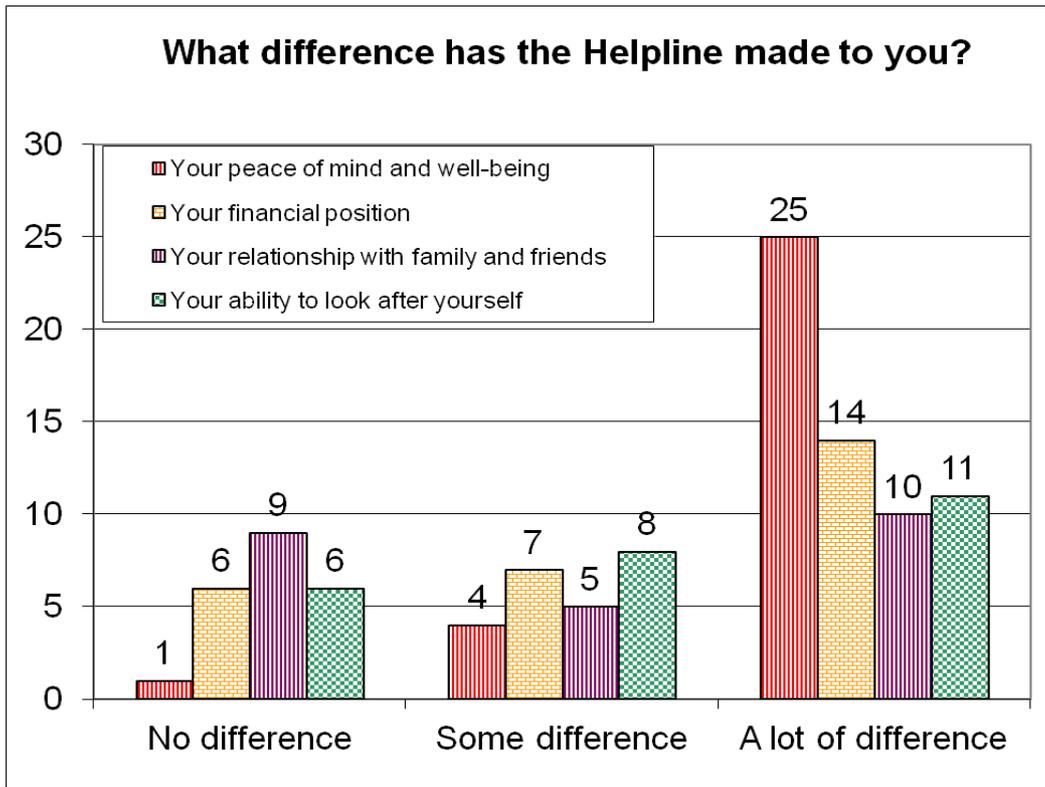
Clients' Survey May/June 2012 Appendix B

A postal survey was distributed to 175 randomly selected recent clients and 36 surveys were returned. All surveys were managed by and analysed by an independent consultancy.

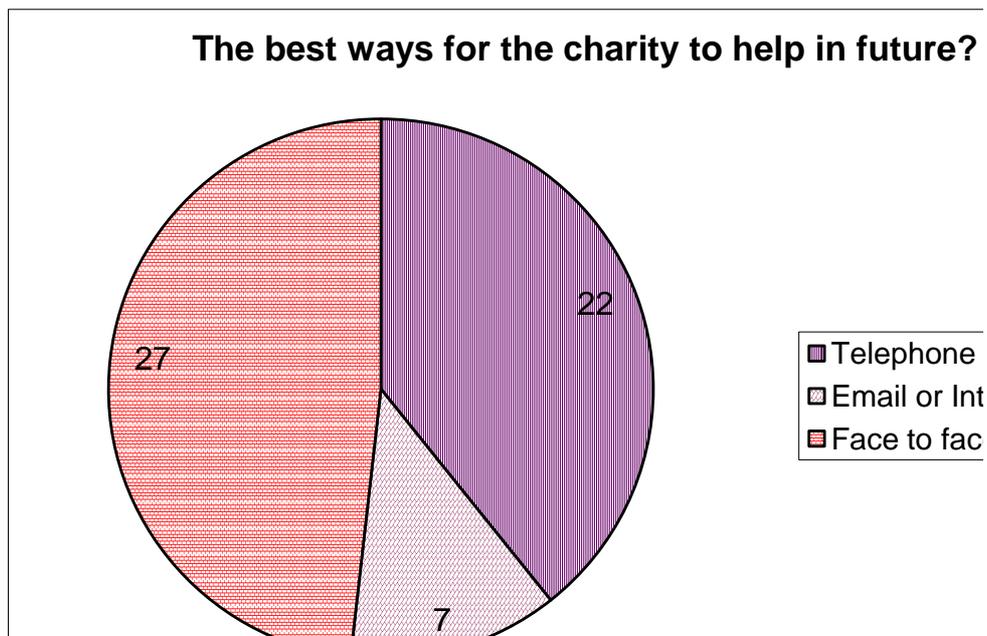
This appendix sets out the survey's main findings. Quotes from respondents have been included to give a sample of the comments made, or when specific issues or recommendations have been made.



Although we advertise our services quite widely within the Borough, we see that most people learn about us from their friends. This complements our marketing and communications strategy; it is evidence that we have an excellent reputation and that our clients have confidence in our services.



Our clients' questionnaire findings tell us we make a very positive difference to 70% of clients' peace of mind and well-being; 58% say that we make a lot of difference to their financial position; 44% say we significantly help improve their relationships with family and friends and 45% say we make a positive difference in helping them to move towards independence. Our self-help tools will enable us to focus on the remainder.



Some respondents identified more than one "best" way.

The questionnaire also invited clients to “add any comments about the service that you received or ways in which we could improve our service”; here are some of the responses:

“Everything was explained in a way that I could understand.”

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

“Very good advice and very helpful.”

“Problems with not being phoned back.”

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

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

“Everybody was very friendly”.

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

“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.”

“A great help and now I have a home and I know I can’t end up on the streets.”

“Helpful, friendly advisors. Knowledgable and polite. It’s nice to find someone that doesn’t judge me or my disability.”

“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.”

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

“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.”

“We can’t sing their praises high enough.”

“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.”

“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.”

Partners' Focus Group

Appendix C

The consultant met on 21st August 2012 with a group of our partners – JobCentre Plus, DWP, Disability First, Help Direct, West Lancashire Carers Centre and West Lancashire CVS

Participants did not attend in a representative capacity. Comments expressed in these notes should not be taken as representing the views or policy position of any or all of the organisations attending.

The people at the Focus Group meeting together produced the following comments.

A SWOT Analysis by partners:

<p>Charity's Strengths</p> <ul style="list-style-type: none"> • It supports the community • High knowledge level • Impartial • Supportive/caring ethos • Flexible • Good reputation • Queen's Award holder • Dedicated • Volunteer-based • Well-known. 	<p>Charity's Weaknesses</p> <ul style="list-style-type: none"> • Funding dependent mainly on grants • Limited capacity – can it cope with an increase in demand? • Mixed experience of partnership-working. • Poor premises – car parking. Do they provide a confidential space for clients' interviews?
<p>Charity's Opportunities</p> <ul style="list-style-type: none"> • Opportunities to form consortia with other agencies • Reopened CAB • 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. 	<p>Charity's Threats</p> <ul style="list-style-type: none"> • Loss of grants • Some agencies might develop their own welfare benefits services • Not being ready for welfare benefits changes • Coping with clients' needs and expectations after benefit changes • Cross boundary bids – i.e. other providers bidding against us • Chasing funding.

Advice to the charity by partners:

Avoid	Continue doing
<ul style="list-style-type: none"> • Duplicating what others do • Chasing the wrong funding • Losing your identity • Taking on activities and services that the Council have cut – being dumped on! 	<ul style="list-style-type: none"> • Maintain expertise • Funding work • Maintain high customer standards
Evaluate idea/possibilities	Steer clear of
<ul style="list-style-type: none"> • Consortia and partnerships bids • Develop a training programme about the forthcoming welfare benefits changes for other agencies (not just advice workers) – charge for it. 	<ul style="list-style-type: none"> • Pointless projects • Clients becoming too dependent on the charity – aim to help clients to be independent.

Other points by partners:

1. Some clients disappointed that they are not seen straight away
2. Could the charity signpost and refer on more?
3. Could it provide better feedback to organisations that have referred clients to it?
4. It will need to manage clients' expectations as the welfare benefits system changes – it will not be able to win as much as the system will have less discretion
5. Money management could become a big issue for several clients as new welfare benefits will be paid monthly; personal budgets. Clients will need support
6. The charity is well known by other organisations – not so sure that the general public knows it
7. The name is no longer a fair reflection of what it does
8. Carers don't relate to the word 'disability'
9. How often is the answer phone on?
10. Volunteering could be a real opportunity – develop specialist roles
11. The charity could feed into the Local Strategic Partnership (now One Lancashire)
12. It should have a higher profile in local networks as these often lead to opportunities and partnerships
13. Need to raise its profile and secure media coverage
14. Need better evidence – focus on outcomes.

Developing the Income Base

Appendix D

	Description	Potential	Action points
Grant aid support from traditional charity funders	Making applications to funders with relevant criteria	Traditional source of funding	<ul style="list-style-type: none"> • Continue • Build relationships with existing funders • Identify possible projects
Contracts to deliver specific services	Commissions from statutory bodies to deliver contracted services on their behalf	Could develop as public bodies rely on outsourcing and move into commissioning	<ul style="list-style-type: none"> • Ensure bid readiness • Make contact with commissioners to show what the charity could offer • Raise profile with commissioners • Ensure the charity is on any approved lists
Funding for fixed term projects	Identify and scope potential projects that funders might back	Increased interest in innovation and new projects	<ul style="list-style-type: none"> • Develop ideas for new projects • Ensure all projects are fully costed • Ensure all projects have exit or succession plans
Earned income – from sub contracts/ partnerships	The charity as a specialist provider	Increased emphasis on partnerships and collaboration	<ul style="list-style-type: none"> • Identify possible partners and sub contractors
Payments from clients' personalised budgets	Support clients in managing their own care budgets	Hard to estimate as personal budgets are still being developed	<ul style="list-style-type: none"> • Make contact with lead implementation Managers • Could the charity offer a money advice service?
Traditional from donors and supporters	Highly competitive, but still some market potential	Will not be a major income stream, but could provide some useful unrestricted income	<ul style="list-style-type: none"> • Market the membership scheme • Recruit volunteers to work on fundraising • Raise identity as a <i>local charity</i> • Plan a campaign

The new project will be focused upon our two client groups – disabled people and their carers in West Lancashire. These groups are different target audiences and we will employ different communication methods for each.

Within West Lancashire, we will advertise our service by a variety of methods. Examples include the local press, in other organisations' and partners' newsletters, publicity materials in universities, health centres, doctors' surgeries and especially Ormskirk Hospital and West Lancashire Carers' Centre.

Publicity materials include pens, telephone pads, carrier bags, information leaflets, doctors' appointment cards, coasters and bookmarks. These are available within a membership pack that clients receive when they become members and can be distributed to other people; this is useful to us as many of our referrals are made by word of mouth.

Our communication to members will give them opportunity to participate in our client focus groups, welfare workshops and training & development sessions. As well as other methods, we will use our website and LED display in our office to publicise these events. Members will receive priority.

We have a visible window display that will help to raise our profile to passers-by. We have our own website that is advertised extensively on other organisations' websites as well as our own publicity material.

We are listed in various local, regional and national directories. Our team participates in presentations to the general public and other appropriate groups as well as encouraging their representatives to give presentations at our team meetings.

We have a policy of using the local press when we receive grants and donations and various quality awards. We will also use the local press and our website to publicise the dates and times of our outreach stations. We will use our experience of appearing on local radio and regional television to raise our profile, when there are opportunities to do so.

Our Annual General Meetings are always advertised in the local press inviting members of the public to attend. We also invite funders; this gives us an opportunity to highlight our successes as well as outlining future plans.

We will share the project's findings annually with policy-makers and appropriate national organisations with which we have links; they can cascade this feedback to local groups nationally. We will show how our clients' needs are changing and what impact changes in policy, funding and other factors could have. We will also recognise and celebrate the difference we make to clients' lives, in the context of the positive outcomes in terms of health improvements, supporting independence and clients' economic circumstances.

Targets and Smart Objectives

Appendix F

The charity has set itself some targets to be met over the next three years:

Staff moved into new roles that support new self-help tools	Oct 2013
Train 15 volunteers to deliver new self-help early intervention	Oct 2013
Review our income base plan	quarterly from Oct 2013
Implement marketing and communications strategy	Nov 2013
Hold meetings, supervision, monitoring, training & evaluation	monthly from Nov 2013
Measure clients' stress and anxiety	quarterly from Nov 2013
Assess our impact on clients' self-confidence/independence	every 2 months from Nov 2013
Welfare workshops with clients	every 2 months from Dec 2013
Focus groups with clients for appraisals	quarterly from Jan 2014
Training and development sessions with clients	quarterly from Jan 2014
First half yearly-report due	Apr 2014
First end of year report due	Nov 2014
Share project's findings with appropriate national organisations	Nov 2014 *
Second half-yearly report due	Apr 2015
Second end of year report due	Nov 2015
Share project's findings with appropriate national organisations	Nov 2015 *
Assess the impact of any new legislation	Jan 2016 *
Third half-yearly report due	Apr 2016
Third end of year report due	Nov 2016
Evaluate/share project's findings with appropriate organisations	Nov 2016 *

* Some of these activities will be ongoing.

Realisation of these targets above will lead to the delivery of the following 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.

Organisation Budgets 2013 - 2016 Appendix G

	Year Ending 30/09/2014	Year Ending 30/09/2015	Year Ending 30/09/2016
REVENUE	127,481	130,387	133,380
Payroll	96,876	99,782	102,775
Training	6,000	6,000	6,000
Travel - staff	465	465	465
Expenses of volunteers (incl trustees)	7,400	7,400	7,400
Other office costs	16,740	16,740	16,740
OVERHEADS	54,162	54,162	54,162
Payroll (Manager only)	35,637	35,637	35,637
Premises (incl Rent, Rates, Cleaning & Electricity)	16,755	16,755	16,755
Governance	1,770	1,770	1,770
CAPITAL			
New computers	3,000	0	0
Total values	184,643	184,549	187,542