

---

Citation:

Warwick-Booth, L and Trigwell, J and Kinsella, K (2016) MAKING ADVICE WORK (CALDERDALE) EVALUATION FINAL REPORT. Project Report. Leeds Beckett University.

Link to Leeds Beckett Repository record:

<https://eprints.leedsbeckett.ac.uk/id/eprint/2527/>

Document Version:

Monograph (Other)

---

The aim of the Leeds Beckett Repository is to provide open access to our research, as required by funder policies and permitted by publishers and copyright law.

The Leeds Beckett repository holds a wide range of publications, each of which has been checked for copyright and the relevant embargo period has been applied by the Research Services team.

We operate on a standard take-down policy. If you are the author or publisher of an output and you would like it removed from the repository, please [contact us](#) and we will investigate on a case-by-case basis.

Each thesis in the repository has been cleared where necessary by the author for third party copyright. If you would like a thesis to be removed from the repository or believe there is an issue with copyright, please contact us on [openaccess@leedsbeckett.ac.uk](mailto:openaccess@leedsbeckett.ac.uk) and we will investigate on a case-by-case basis.

LEEDS BECKETT UNIVERSITY



# **MAKING ADVICE WORK (CALDERDALE) EVALUATION FINAL REPORT**

**Dr Louise Warwick-Booth, Dr Joanne Trigwell  
and Karina Kinsella**

**March 2016**

**[www.leedsbeckett.ac.uk](http://www.leedsbeckett.ac.uk)**

## Contents

<b>Summary of Evaluation Findings</b>	pg. 3
<b>1. Introduction</b>	pg. 8
1.1 Project Journey	
<b>2. Making Advice Work Overview</b>	pg.14
2.1 Client monitoring data	pg.14
<b>3. Findings</b>	
3.1 <b>Outcome 1</b> – more people will have access to timely, relevant advice and support provided in the manner that best suits their needs, and so will be better equipped to address and resolve problems	pg.17
3.1.1 MAW website data	pg.17
3.1.2 Client satisfaction questionnaire	pg.18
3.2 <b>Outcome 2</b> – service users benefit from accessing a holistic, person-centred advice service which addresses needs in a joined up way	pg. 24
3.2.1 - MAW training questionnaire	pg. 28
3.2.2 - Event feedback	
3.3 <b>Outcome 3</b> - advice services across Calderdale will be better resourced on a sustainable footing, ensuring that people continue to have access to the help that they need	pg. 34
3.3.1 - Volunteer monitoring data	pg. 37
<b>4. Learning from Making Advice Work</b>	pg. 41
<b>5. Conclusion</b>	pg. 42
5.1 Issues for consideration	pg. 42
<b>6. How we did the research</b>	pg. 43
6.1 -Theory of Change	pg. 43
6.2 - Approach to gathering evidence	pg. 44
Qualitative data collection with stakeholders	
Qualitative data collection with volunteers	
Desk-based analysis	
6.3 - Research ethics	pg. 45
6.4- Limitations of the evaluation	pg. 45
<b>7. References</b>	pg. 46
<b>8. Appendices</b>	pg. 47
Appendix 1 - Stakeholder Interview Schedule	pg. 47
Appendix 2 - Volunteer Interview Schedule	pg. 49

## **Executive Summary including summary of evaluation findings**

### **Introduction**

The Making Advice Work Project (MAW) was set up in 2013 to facilitate advice agencies in Calderdale to work together, and to improve advice and support through partnership. The project was delivered by a group of 4 organisations; Citizens Advice Calderdale Bureau (CACB), Age UK Calderdale and Kirklees, WomenCentre Calderdale and Kirklees and Calderdale Disability Advice Resource (DART). This report presents the findings from an evaluation of MAW conducted by the Centre for Health Promotion Research, Leeds Beckett University. It presents evidence about the project's journey, the project outcomes and the overall learning from the project.

### **Background**

Advice services have found themselves facing pressure from a number of sources in recent years. Following the 2008 recession, demand for advice services rose but at the same time pressure on funding for advice has also increased (Gathergood 2011). In 2011 the government announced a review of not for profit advice services, with a view to supporting transition to a new funding environment. The Advice Services Transition Fund (Big Lottery Programme) provided funding to help not-for profit advice organisations to adapt and develop new ways of working in order to meet local needs which required the development of collaborative ways of working (Cabinet Office 2012). It is within this context that Making Advice Work was commissioned and implemented in Calderdale 2013-2016. This evaluation contributes to the evidence base about advice services in transition, and by assessing the extent to which the project met its outcomes.

### **Evaluation aims and objectives**

The evaluation used a mixed method approach including data from interviews with stakeholders, interviews with volunteers as well as desk-based analysis of monitoring data and survey data. The evaluation sought the views and experiences of staff, volunteers and wider stakeholders in order to ascertain the extent to which the project had met its outcomes. The overarching aim of the evaluation was to ascertain the extent to which the MAW project's aims and objectives had been met. The specific objectives of the evaluation were to:

1. Assess the extent to which the sector has transformed through renewed service models;
2. Ascertain the impact of the project in relation to bringing services together to reduce duplication and work in more efficient ways;
3. Explore the effectiveness of the project from a stakeholder perspective in terms of

- a. Measuring the differences that services can make to people's lives;
- b. Enabling service users to access a holistic, person-centred advice service that can address multiple needs;
- c. The impact of the project in relation to future sustainability and associated resources.

## Overall summary of evaluation findings

- The client monitoring data collected demonstrates an overall increase in advice provision in terms of client reach.
- The monitoring data also shows that clients classed as requiring specialist advice reduced in number during the MAW project. Specialist capacity was reported as fluctuating during the life of the project as a result of staffing and funding changes. However, Tier 1 advice increased during the life of the project. Tier 1 advice includes a range of activities from assisted advice (using an advice website) through to face to face advice where the problem is resolved and does not involve specialist casework. Tier 2 refers to specialist advice in relation to debt, welfare benefits etc. requiring casework.
- The MAW project enabled the organisations involved to publicise their activities both within Calderdale advice services and to others outside of the sector. The increased publicity resulted in increased client numbers, the increased use of online resources and increases in the use of the advice telephone line.
- The MAW project involved the creation of a web-site that was viewed as successful by partners based upon the number of visits recorded, and the increased accessibility of information available on the web-pages. This Tier 1 information and advice was pulled together in one place by the MAW team as a resource that could be used by non-specialists to support them in the provision of basic advice (see [www.mawcalderdale.org.uk](http://www.mawcalderdale.org.uk)).
- Clients predominately sought specialist advice relating to 'benefits/ tax credits', 'health and social care', and 'family and relationships'. Client satisfaction was taken as a measure of service users having their needs met in a holistic way. Of the clients asked, 97% reported getting the advice, help or support that they needed, thus highlighting service impact on clients and the potential wider impact on family and relationships.
- Some partners involved in MAW reported changes in referral patterns between agencies involved in advice provision and cited this as a successful aspect of MAW.

- Partnership working was reported as a success by most of the partners involved in the MAW project, despite some partnership benefits not being anticipated at the outset of the project. However, this was not accompanied by reduced duplication in terms of service provision. The application of a universal model was not possible given that each partner involved in the MAW project operated with different models of delivery. For example, some partners only delivered advice whereas others delivered advice and support.
- Monitoring the outcomes achieved during MAW proved to be more difficult than anticipated, with the use of a Social Impact Tracker not taken up by the smaller organisations involved with the project. Using an Outcomes Star as a universal measure was also not applicable given the different levels of support offered by various partners. Furthermore, partners did not make changes to their internal systems in order to effectively monitor referrals between agencies. These issues made it challenging for partners to report with consistency on their work.
- The training and events provided during MAW were positively evaluated by those participating in them, and by the partnership delivering the project.
- Sustainability drawing upon local business involvement was not achieved. However, the partnership was successful in securing future grant funding.
- The use of volunteers within MAW changed during the implementation of the project and partners had mixed experiences (positive and negative) in relation to volunteering within their organisations. Volunteers also reported a range of experiences, with some being more positive than others. Positive benefits included increased understanding of services provided by other organisations, and increased awareness of the problems encountered by service users.

### **Learning from Making Advice Work**

- Networking events were particularly welcomed by many who attended them, and these were reported by partners as being useful and one of the most successful aspects of the MAW project.
- The MAW project created the opportunity to develop greater awareness and understanding of the issues that exist when delivering specialist advice training to partners.
- The creation of a partnership to deliver MAW was successful on a number of levels; in terms of enhancing knowledge in the local area

about advice provision, the complexity of client problems and the associated need to therefore address these holistically, as well as providing a platform for working together in the future. Sustainability can be enhanced through improved partnership working. The approach used within MAW where each partner was allocated a work stream was transparent. However, attention needs to be paid to resource levels with smaller partners to ensure equal buy in.

- Flexibility is required in delivering programmes such as MAW. The project (with the support of funders) was able to shift its direction at the mid-point of delivery because of changes encountered during the initial phases. This resulted in a different focus for example in relation to the use of monitoring processes and the role of volunteers.
- The skills and abilities of project managers are an essential element of implementation success. Projects such as this which require complex partnership management will be challenged to succeed without project management and appropriate co-ordination.
- When multiple partners are involved in any given project, developing a collective monitoring system can be challenging. Learning experienced during the delivery of MAW suggests that a different model and approach would be required in future work. Partners had not appreciated the level of one to one support and development needed in relation to the implementation of a new monitoring system particularly within smaller organisations.

### **Issues for consideration**

- When working in partnership across services and providers, attention needs to be paid to the routine collection of monitoring data across the life-time of a project, particularly with regard to evidencing outcomes. Streamlining data recording procedures to avoid duplication and using tools that work for everyone would have enhanced the evidence related to MAW.
- Evaluation should be planned from the outset in order to ensure a clearer mapping of project outcomes. An evaluation framework should be developed at the outset alongside the commencement of delivery as this would provide a more complete picture.
- Attention needs to be paid to the capacity of staff within existing organisations in relation to their ability to engage with a new

approach, to participate in available training and to deliver services in a different way. Not all partners involved in MAW had the same capacity or staff levels throughout the project life-time.

- The nature of volunteer roles as well as volunteer capacity also requires consideration. Volunteers are often not a solution to enhancing staffing capacity and/or delivery: they require investment, support and training even if they are available to give their time.
- The MAW project was successful at a partnership and managerial level. However, engaging front-line workers was more difficult. Hence, in future delivery the challenges of engaging front-line workers with project aims and activities in order to increase impact requires more consideration.



## 1. Introduction

The commissioning organisation for Making Advice Work (MAW) partnership is made up of Citizens Advice Calderdale (CAC), Age UK Calderdale and Kirklees, WomenCentre Calderdale and Kirklees and Calderdale Disability Advice Resource (DART). These partners are the largest advice service providers in Calderdale, offering advice provision at the point of contact within the local community. The services currently offered across these organisations include provision for the general public as well as more specifically targeted services for client groups including women, people with disabilities, older people and their carers.

The MAW project is one of more than 250 projects commissioned nationally by the Big Lottery under the Advice Services Transition Fund programme. The funder aims are to:

1. Help the sector transform by renewing their service models in order to reduce duplication
2. Measure the difference that services can make to people's lives
3. Bring providers together to be more efficient and effective

It is within this funding context that Making Advice Work Calderdale was set up in October 2013, with the involvement of all of the above named partners who participated as part of their service delivery. The ultimate aim of MAW is for agencies in Calderdale to work together, and to improve advice and support through partnership as described by some of the stakeholders involved:

“What we're trying to do is to make advice work, so it's about really making sure that people get the right advice at the right time from the right agency.” *Stakeholder 1*

“They were trying to make it easier for people to find the right advice so they're not going from pillar to post, they're not going from one agency who's telling them you have to go to this agency. It was to make it easier for people to get the right advice first time.” *Stakeholder 2*

The MAW Calderdale team had 3 outcomes that they were aiming to achieve during the life of the programme as follows:

1. Outcome 1 – More people will have access to timely, relevant advice and support provided in the manner that best suits their needs, and so will be better equipped to address and resolve problems
2. Outcome 2 – Service users will benefit from accessing a holistic, person-centred advice service which addresses needs in a joined up way
3. Outcome 3 – Advice services across Calderdale will be better resourced on a sustainable footing, ensuring that people continue to have access to the help that they need

It is these 3 outcomes that the evaluation team are reporting project progress upon in this document.

Operationally, the project has been implemented with the following structure in place. The staff team was made up of:

- 2 full time workers - a volunteer manager and trainer
- 2 part time welfare benefit specialists
- 1 monitoring officer
- 1 business development manager
- 1 worker supporting administration

The MAW partnership was also managed through the creation of a core project working group which met every 2 months during the lifetime of the project.

Each of the partner Chief Executives also contributed time to the project and provided line management to staff. The staff team were embedded in each of the partner organisations and reported to the MAW partnership board on a quarterly basis. Calderdale CAB was the lead partner for the project. The three larger partners each led on a 'strand' of the project work as follows:

- Calderdale CAC took the lead on ensuring that people are better equipped to address and resolve their problems. This involved carrying out a detailed survey on the type and nature of advice provision available within the Calderdale area and conducting a cross sector analysis of the numbers of volunteers active within the area as a mechanism to gain understanding of their motivations, requirements and training needs.
- WomenCentre took the lead on enabling service users to access a holistic, person-centred advice service which addresses multiple needs in a joined-up way. WomenCentre took the lead on identifying, understanding and planning the development and utilisation of the Social Impact Tracker (IT tool), which was envisaged as a useful approach in collating positive outputs and client journeys. Clients from DART were utilised as part of a data input trail using the Social Impact Tracker, with support from WomenCentre. WomenCentre also examined and assessed the potential of data sharing methodologies amongst the primary partners involved in MAW.
- Age UK had responsibility for ensuring that advice services across Calderdale are better resourced, on a sustainable footing. This work involved investigation and subsequent recommendations related to the future sustainability of information and advice including increased partnership working, methodologies for securing funding/donations and the examination of charging policies.

The project was overseen by a steering group, who were independent from the MAW project, and thus were used to provide both external validation

and scrutiny of the approach and associated delivery. The steering group role involved challenging and analysing activities being delivered via MAW, and it further served to increase strategic-level awareness outside of the immediate partnership network. Members of the steering group included local authority department heads, a local neighbourhood manager and an advice service lead. The steering group met every 6 months.

## 1.1 Project Journey

The project aimed to engage with the wider voluntary sector and with related agencies across Calderdale, raising awareness of the severe, multiple and interconnected nature of the difficulties faced by the most disadvantaged communities –e.g. debt, housing problems, health and employment difficulties and entitlement to welfare benefits –. Awareness raising was a fundamental part of the project, with several well-attended events organised and delivered by the MAW team.

Figure 1 – Awareness raising event delivered as part of MAW: November 2015



However, the implementation of MAW did face some challenges in relation to the delivery of the proposed model, which was based upon skilling up the ‘front-end’ workforce and boosting capacity through additional volunteer recruitment. Implementation challenges included:

- i. Outside the core partnership (CAC, WomenCentre, Age UK, DART), levels of awareness and understanding required raising among front-line staff around the multiple challenges faced by their service users. Many organisations involved in providing services and support were not advice specialists. Thus, at the mid-point of delivery, awareness raising and the provision of basic information for such front-line workers became a top priority, in order to enable them to be able to signpost vulnerable clients to appropriate agencies before problems became intractable, or urgent. For example, some service users experience complex debt problems or can be faced with the imminent threat of repossession or eviction. This was addressed through networking events and the circulation of a newsletter. Training in tailored information-giving as per the initial project plan was therefore not appropriate in the first year of delivery given the limited specialist advice knowledge and increasing complexity and inter-relatedness of issues rather than the low skills base.
- ii. Secondly, many local organisations were small in size and consequently lacked the necessary systems and structures to properly support volunteers, especially as they were working hard to address increasingly complex local need. In practice many volunteers were not in client-facing, or located within information-giving roles. This limited the use of volunteers as it was initially envisaged because the core partnership found that it was both unrealistic and inappropriate to introduce more volunteers in the absence of support frameworks. One stakeholder discussed the changes that were necessary once delivery had begun:
 

“I think that when the bid was written the idea was that we would cast our net wide and we would recruit a pool of volunteers and as partners we would be able to draw on these volunteers. In reality you can’t really do that with volunteers, the volunteer needs to be recruited and embedded and supported within your organisation, you can’t kind of swap them around to meet demand as and when.” *Stakeholder 2*
- iii. Thirdly, it was also found that it was not appropriate to request detailed tracking and monitoring of the information and advice given to clients, given the small scale nature of many organisations involved in MAW activities. This has had an impact upon the evaluation data because there are several gaps. The range of different organisations involved resulted in varying levels of contact with advice service users and thus different levels of information being recorded. The majority of internet figures also had no detail. It is worth noting too that when working with advice client that some do not wish to disclose details of sexuality and religion.

Thus, in light of these issues the focus of the MAW delivery shifted during implementation to be more focused upon equipping and training front-line workers from both the core and wider partnership.

- iv. Fourthly delivering more advice information via volunteer contacts was not possible, therefore the focus shifted to working with agencies outside of the core partnership. However, volunteers were still used within MAW with partners working towards increasing volunteer hours as part of increasing the volunteer contribution. It was recognised during the MAW project that volunteers needed considerable training and support, and that some organisations did not have the time or the capacity to recruit, train and support volunteers.
- v. Finally; there were also other resource issues during the delivery of the project related to staff capacity. For example, the recruitment of the Volunteer Manager and Advice Trainer was a lengthy process, exacerbated by the Christmas holiday period. Furthermore the temporary loss of the trainer also had an impact upon training delivery during the second year of delivery. Changes in delivery were discussed by a stakeholder:

“I think one of the things that became quite evident quite quickly was that the model that had been submitted for the bid wasn’t necessarily the model that was best to move forward with in terms of the staff that were employed.” *Stakeholder 3*

Despite the issues noted above in relation to changes to the project once delivery commenced, there was still a large amount of work completed under the MAW project remit. For example, a large amount of publicity work was completed through meetings, network sessions, presentation and attendance at events and other organisations meetings. Social media was also used as a mechanism to raise awareness. A newsletter was created and distributed on a regular basis to a range of partner organisations. Leaflets containing details of the web-site and telephone advice service number were also distributed to local libraries. Formal networking events were created and delivered frequently during the life of the project. These were seen by the MAW partnership as a way to share information and discuss best practice.

To illustrate some of the work undertaken under the MAW remit, during the last quarter of the project, the following were delivered (this list is not exhaustive):

1. One immigration training workshop delivered to partners to raise awareness of immigration issues and support available in Calderdale
2. Accredited training for advisors was purchased, which will be delivered to non-specialist advisors in the future
3. A Halifax orientation map was translated into community languages, and 5000 were produced. This was circulated to neighbourhood teams, GP’s, a range of voluntary sector support agencies, police, Children’s Centres and local Homestart teams



4. A bus advertising campaign was undertaken. 100 buses over a 4 week period carried information that was aimed at creating awareness of advice provision in Calderdale and the MAW web-site
5. CAC advisor training (a specialist qualification), was provided for 1 Welfare Advisor from WomenCentre
6. Website work was undertaken; a re-design was done in order to improve the accessibility of the web-site and to include a search facility. Videos of advice impact and links to new pieces of partnership delivery are also in the planning stages;
7. MAW began working with partners to develop a bid for submission around working with women in crisis. The 'Help in Crisis Bid' was submitted to the Lottery and is at the point of a successful second stage application. This work is related to the MAW partners recognising how clients with complex needs require multidisciplinary and sustained engagement to deal with issues of crisis.

Finally, the project did not have a dedicated project manager and given the remit of MAW and the multi-agency nature of such a project, it would have benefitted from specific project management investment. Despite this, the project co-ordinator was positively viewed:

"She's been absolutely fantastic, I think she's been the key to the whole project (referring to the project co-ordinator)." *Stakeholder 9*

"You need somebody to project manage." *Stakeholder 3*

## 2. Making Advice Work Overview

### 2.1 Client monitoring data

Monitoring data was available for Year 1 (Quarter 1 to 4) and Quarter 1, 2 and 3 (for the months of October and November 2015 only) of Year 2<sup>1</sup>. In total, across the funding period advice was given to 172,299 clients. 94.3% of clients (n=162,418) received advice from CAB, 3.2% (n=5435) MAW website<sup>2</sup>, 1.9% (n=3267) Age UK, 0.4% (n=720) WomenCentre and 0.3% (n=459) Dart. Of these clients, 165,155 (95.9%) received tier 1 advice, 4907 (2.8%) specialist advice and for 2237 (1.3%) clients the type of advice they received is unknown. For a full breakdown of client demographics see Table 2.1.

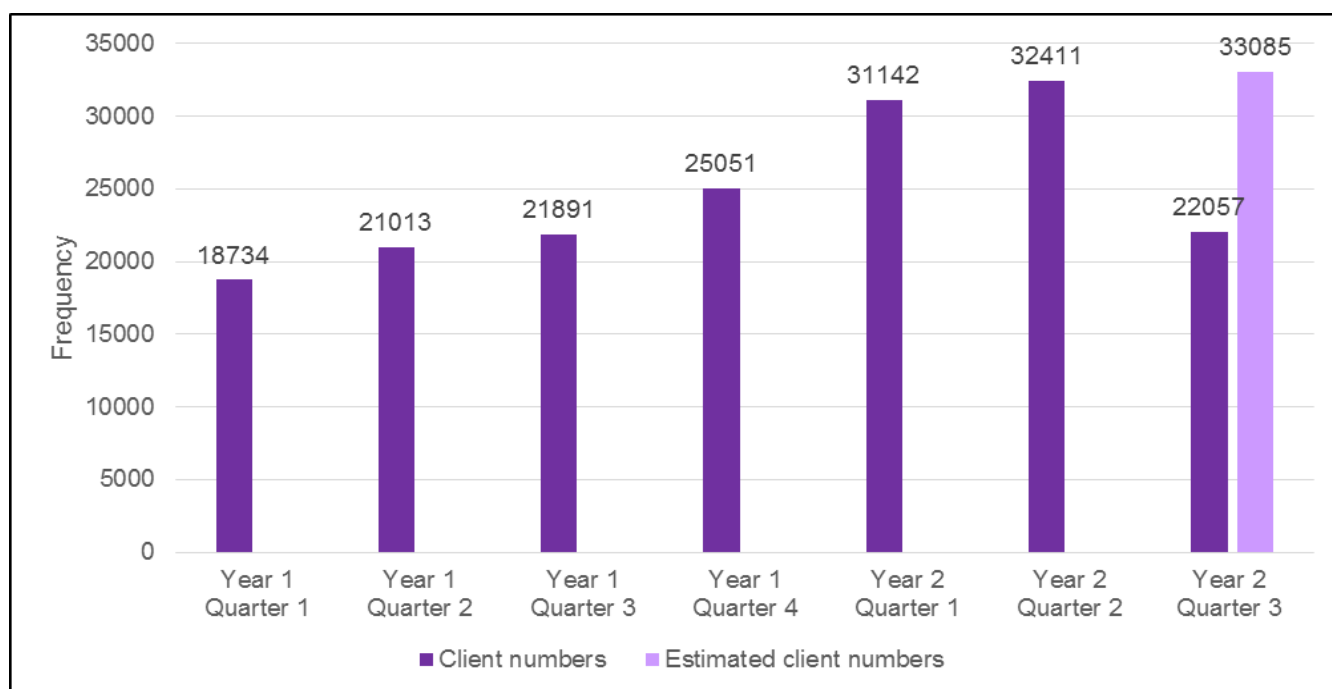
**Table 2.1. Client Demographics**

		<b>Total</b>
Sex	<i>Female</i>	9750
	<i>Male</i>	6875
	<i>Unknown</i>	155,674
Age	<i>Under 25</i>	1059
	<i>26-64</i>	10543
	<i>65+</i>	2595
	<i>Unknown</i>	158,102
Ethnicity	<i>White</i>	12891
	<i>Mixed</i>	73
	<i>Asian</i>	1446
	<i>Black</i>	169
	<i>Other</i>	358
	<i>Unknown</i>	157,362
Carer	<i>Yes</i>	546
	<i>No</i>	4557
	<i>Unknown</i>	167,196

On average, 24,614.1 clients accessed services each quarter (range=18,734 to 32,411; SD=5245.5). Across the funding period, client reach increased by 17.7% (18,734 to 22,057). Data shows quarterly increases in client numbers between Year 1 Quarter 1 (n=18,734) and Year 2 Quarter 2 (n=32,411) (See Figure 2.1 for full breakdown). During this period, there was a 73% increase in client reach across the services. Client reach decreased by 31.9% between Year 2 Quarter 2 and Year 2 Quarter 3, which may be attributable to the incomplete dataset for Year 2 Quarter 3 (data was only reported until project end, November 2015).

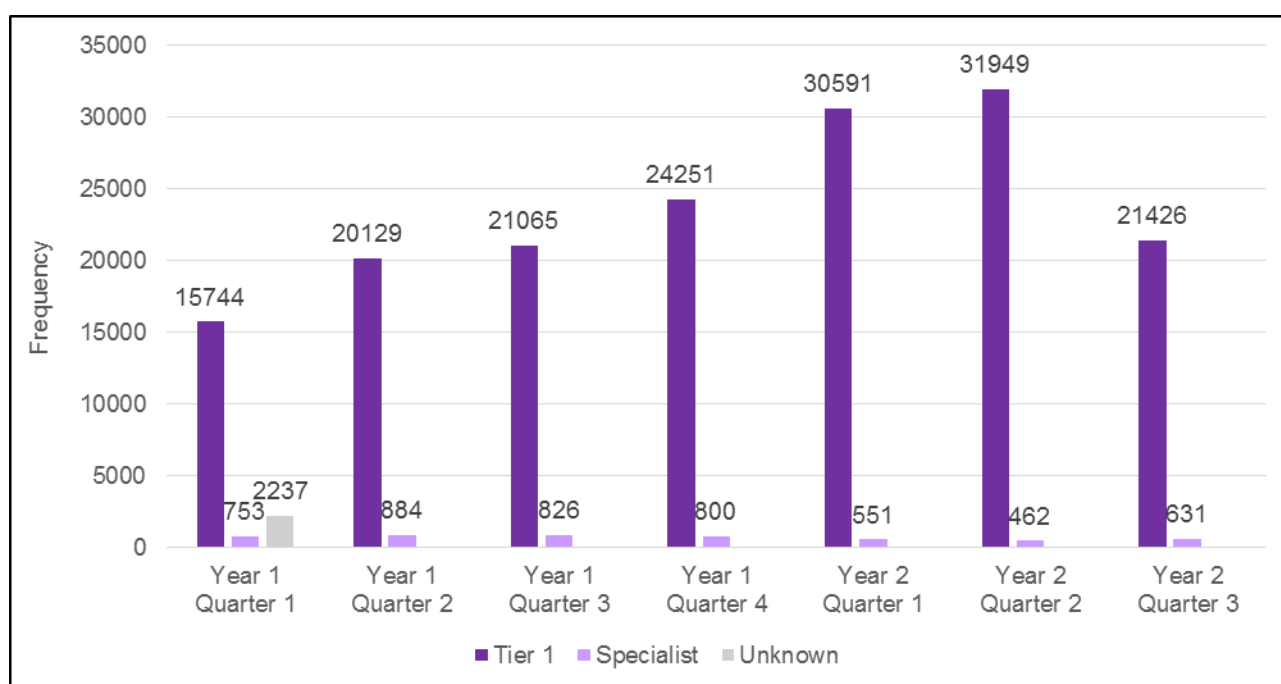
<sup>1</sup> Please note, CAB figures for Year 1 Quarter 4 relate to the period December to February (not January to March). Age UK figures for Year 1 Quarter 4 are based on an average of the previous 3 quarters. Figures for Year 2 Quarter 3 are for the period 1<sup>st</sup> October to 30<sup>th</sup> November 2015 (end of project funding).

<sup>2</sup> Data for MAW is only available from Year 1 Quarter 3 to Year 2 Quarter 2.



**Figure 2.1. Number of clients per quarter<sup>3</sup>**

Moreover, up until the final quarter the number of clients receiving tier 1 support increased quarterly, whilst there was an overall decline in clients accessing specialist advice (see Figure 2.2 for a full breakdown).



**Figure 2.2. Number of clients per quarter by client need**

<sup>3</sup> Estimated client numbers may have been over/under estimated and therefore should be treated with caution.



*Key findings – the project*

- Client monitoring data collected demonstrates an overall increase in advice provision in terms of client reach.
- The monitoring data also shows that clients classed as requiring specialist advice reduced in number during the MAW project. Specialist capacity was reported as fluctuating during the life of the project as a result of staffing and funding changes. However, Tier 1 advice increased during the life of the project.

### 3. Findings:

#### 3.1 Outcome 1 – More people will have access to timely, relevant advice and support provided in the manner that best suits their needs, and so will be better equipped to address and resolve problems

The MAW project enabled the organisations involved to publicise their activities both within Calderdale advice services and to others outside of the sector. Citizen's Advice reported that this increased publicity resulted in increased client numbers, the increased use of online resources and increases in the use of their telephone line. One stakeholder discussed the increased reach that had been achieved:

"I suppose we're seeing a rising number of people accessing advice over the phone and to a certain extent by email...trying to make people aware that they didn't have to come into Halifax, they could use the phone, they could use email. Our support workers could get in touch directly with advisors, that sort of thing. I think before it was quite gated advice services so I think that aspect of it is working a little bit better." *Stakeholder 3*

##### 3.1.1 MAW website data

During the period December 2014 (5<sup>th</sup>) to November 2015 (30<sup>th</sup>), the MAW website had 4532 users, of which 3286 were new users (72.5% were new users based on google analytical estimates). Moreover, the MAW website recorded 10,713 page views, with 8609 unique page views. In total, 6434 sessions took place; 4663 were new sessions (including at least one visit) and 1771 sessions were undertaken by returning users.

One stakeholder also commented about the website usage in a positive way;

"Things like the website we know that that's been used a lot, so getting a lot of that low-level advice and information signposting up on the website so that's probably making certain bits of information more accessible to services users." *Stakeholder 7*

Several stakeholders stated that the website has been a useful tool.

"The website has been useful for me in terms of finding local advice services." *Stakeholder 15*

As well as aiming to improve the accessibility of advice, one of the aims of MAW was to measure the needs of service users in a more holistic manner. Client satisfaction was taken as a measure of service users having their needs met in a more holistic way. Data from clients who completed a questionnaire about their service use is reported below.

### 3.1.2 Client satisfaction questionnaire

#### Sample

36 respondents completed the client satisfaction questionnaire. Just over half of respondents were female (55.6%) and 97.1% aged 25 to 65+. All respondents were White. For a full breakdown of respondents demographics see Table 3.1.

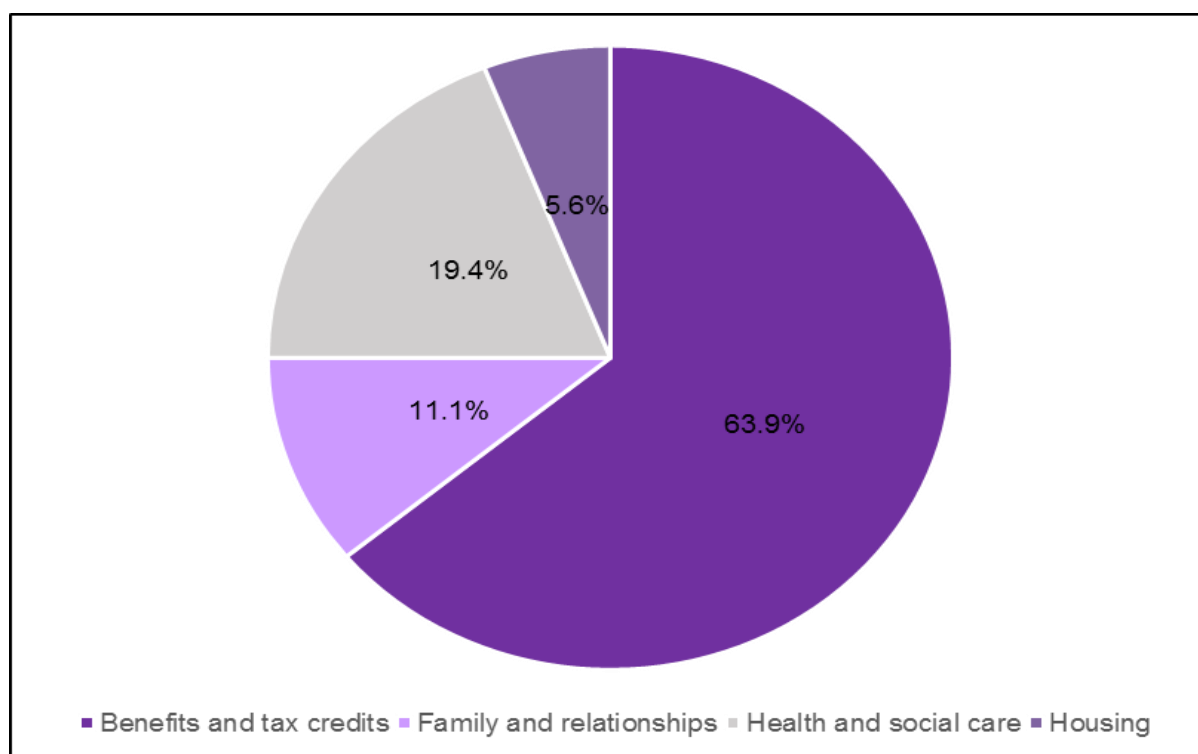
**Table 3.1. Respondent demographics**

		Frequency (%)
Sex	<i>Female</i>	20 (55.6)
	<i>Male</i>	16 (44.4)
Age	<i>0-24 years</i>	1 (2.8)
	<i>25-64 years</i>	16 (44.4)
	<i>65+ years</i>	19 (52.8)
Ethnic background	<i>White</i>	36 (100)
Religion	<i>No religion</i>	14 (38.9)
	<i>Christian</i>	5 (13.9)
	<i>Buddhist</i>	1 (2.8)
	<i>Other</i>	3 (8.3)
	<i>Missing data</i>	13 (36.1)
Disability status	<i>Disability</i>	25 (69.4)
	<i>No disability</i>	9 (25)
	<i>Missing data</i>	2 (5.6)
Sexual orientation	<i>Heterosexual</i>	27 (75)
	<i>Homosexual</i>	1 (2.8)
	<i>Bi-sexual</i>	1 (2.8)
	<i>Missing data</i>	7 (19.4)
Carer	<i>Carer</i>	6 (16.7)
	<i>Not a carer</i>	28 (77.8)
	<i>Missing data</i>	2 (5.6)

#### Advice and support

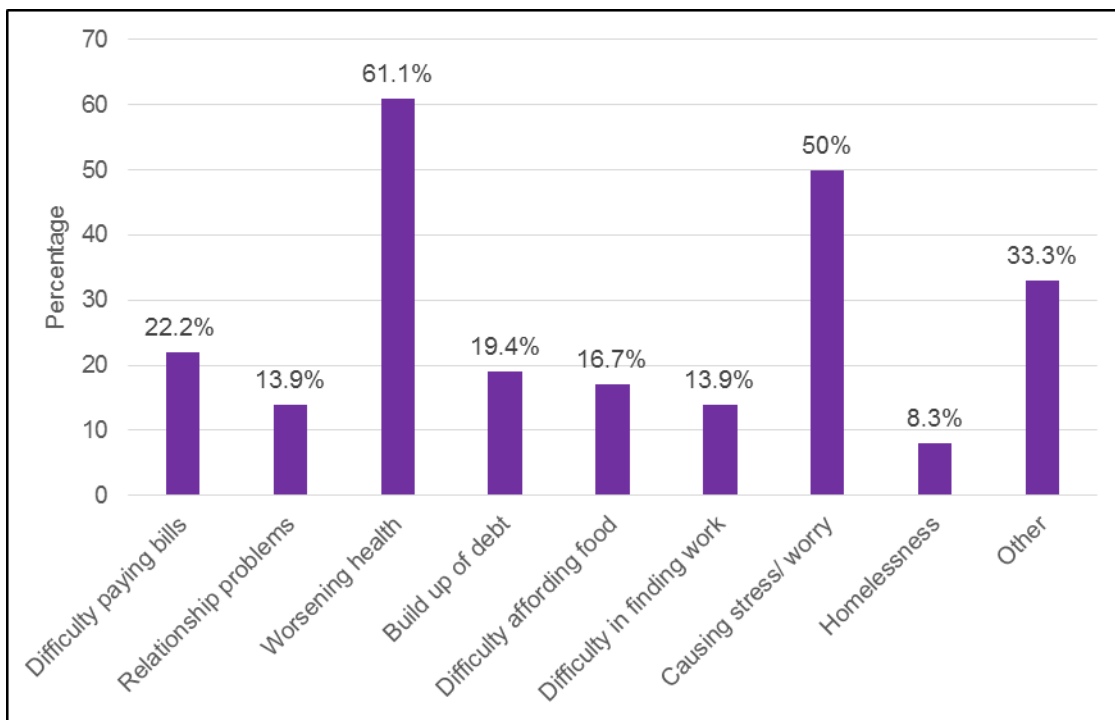
50% of respondents had accessed support or advice from Age UK services, 27.8% Dart and 19.4% WomenCentre. One (2.8%) respondent did not state what service they had accessed.

Clients were asked 'what was the main problem you were helped with?' (See Figure 3.2 for a full breakdown of responses). For 63.9% of clients, the main problem they required advice for was 'benefits and tax credits'. Other 'main problems' clients were helped with included: 'health and social care' (19.4%), 'family and relationships' (11.1%) and 'housing' (5.6%).



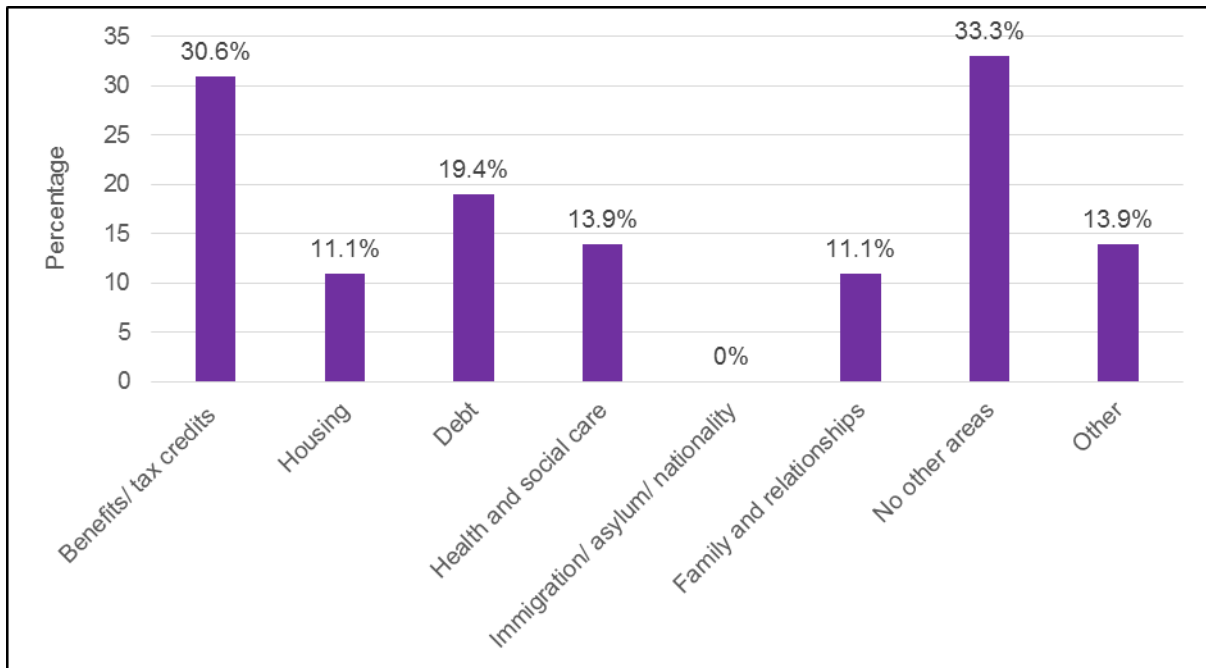
**Figure 3.1. What is the main problem you were helped with?**

Respondents reported problems experienced were affecting themselves and their family (see Figure 3.3 for a full breakdown of responses). 61.1% of respondents stated these concerns were resulting in 'worsening health', 50% 'stress/worry' and 22.2% 'difficulty paying bills'. Additional problems experienced included: 'build-up of debt' (19.4%), 'difficulty affording food' (16.7%), 'relationship problems' (13.9%), 'difficulty in finding work' (13.9%) and 'homelessness' (8.3%). One third of respondents (33.3%) reported 'other' problems. Examples included absence from work, isolation and reduction in income.



**Figure 3.2. How was this affecting you and your family?**

Alongside the main issues clients sought advice for; respondents were asked if they had received advice for other issues (see Figure 3.4 for a full breakdown of responses). One third of clients (33.3%) had only sought assistance for their 'main problem'. Additional problems where advice was sought, included: 'benefits/ tax credits' (30.6%), 'debt' (19.4%), 'health or social care' (13.9%), 'housing' (11.1%) and 'family and relationships' (11.1%). 13.9% of respondents stated 'other issues', including confidence building, help with mobility and hospital transitions.



**Figure 3.3. Along with the main issue that you sought advice for, did you also receive advice on any of the following areas?**

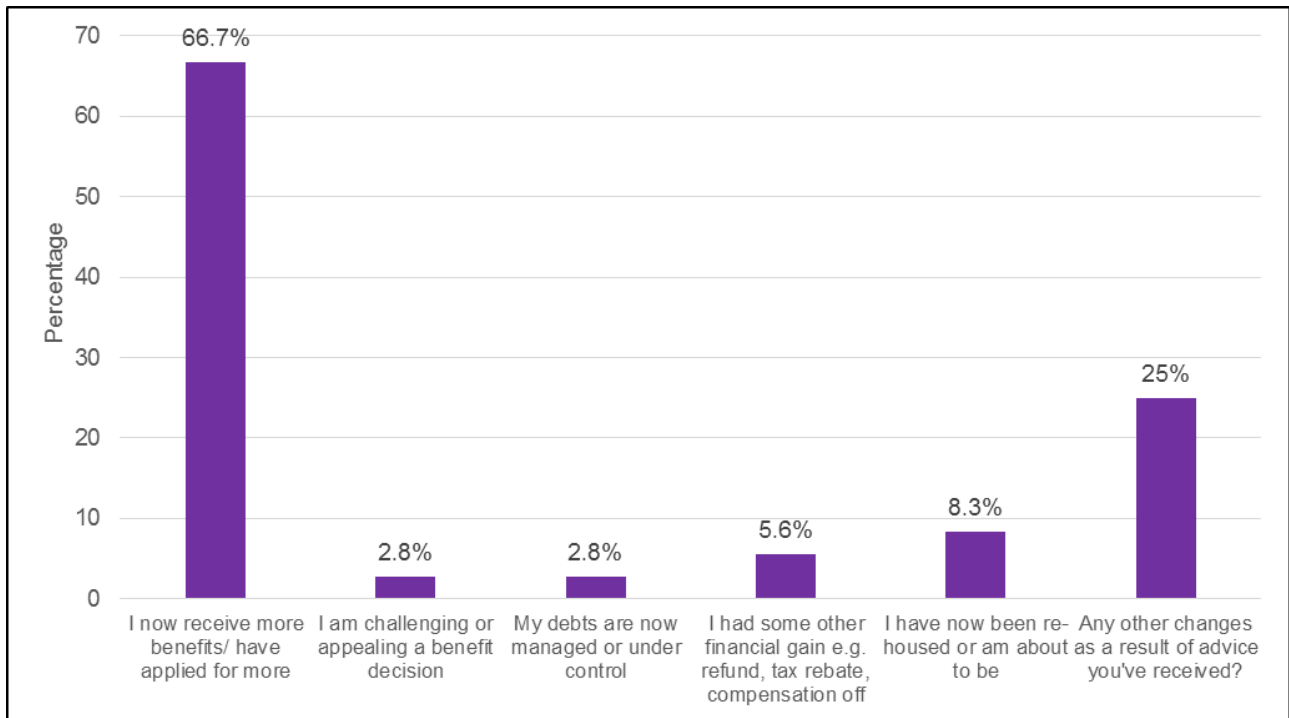
Overall, respondents offered a positive review of service accessed. The majority of respondents (97.2%) felt that they 'got all the advice, help or support they needed to deal with the issue'. One respondent felt they did not get sufficient help, support or advice. Moreover, all respondents were very satisfied (95.5%) or fairly satisfied (4.6%) with the advice they received<sup>4</sup>.

As a result of receiving advice from the service, three quarters of respondents reported their problem had been 'completely sorted out'. A further 27.8% of respondents stated their problem had been 'sorted out in part'<sup>5</sup>.

Respondents were asked 'what has changed as a result of the advice you received?' (For a full breakdown of results see Figure 3.5). Overall, two thirds (66.7%) of respondents 'now receive more benefits/ have applied for more', 8.3% have been 're-housed/ or are about to be' and 5.6% had some 'other financial gain e.g. refund, tax, rebate, compensation off'. One quarter (25%) of respondents reported 'other' changes, including for example, acceptance of situation, finding employment, relocating and reduced social isolation.

<sup>4</sup> Data collected from Age UK respondents for this question is missing (sample size=22)

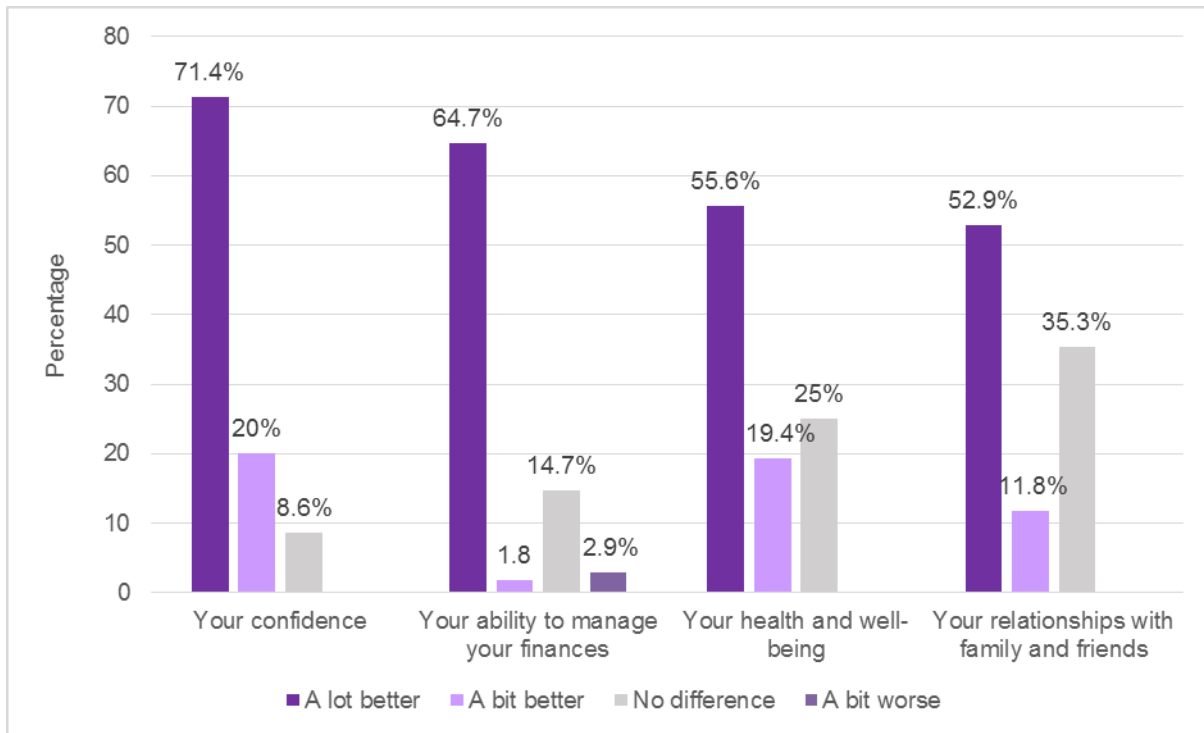
<sup>5</sup> Percentages add over 100 as one respondent stated their problem had been 'completely sorted out' and 'partly sorted out'.



**Figure 3.4. What has changed as result of the advice you received?**

Nearly all of clients (94.2%) felt they could 'not have resolved their problem(s) without the advice received'. A further 5.7% stated the advice received was 'fairly important to sorting out problems'.

Overall, respondents reported the advice received had improved their 'confidence', 'ability to manage finances', 'health and well-being' and 'relationships with family and friends' (for a full breakdown of results see Figure 3.6). The advice given had made the greatest difference to respondents' 'confidence' - 91.4% stated their confidence had improved and 'health and wellbeing' (75%). A further 66.5% of respondents found the advice had made a positive difference to their 'ability to manage finances' and for 64.7% their 'relationships with family and friends'. One respondent reported the advice received had made their ability to manage their finances 'a bit worse'.



**Figure 3.5. Difference advice has made to clients**

As a result of the advice received, all respondents reported they now knew where to seek appropriate advice if needed. Whilst 71.9% of clients felt they were now able ‘to manage their issue independently’, 28.1% of respondents reported this was not true for them.

Finally, some of the stakeholders noted changes in referral patterns and cited this as a measure of the success of MAW;

“We’ve noticed that we’ve had referrals from CAC; there have been referrals going backwards and forwards, so in that respect I think that has worked.” *Stakeholder 2*

“I’m so sure that it’s made a huge difference to our clients because I think our clients tend to either go to CAC or come to Age UK, and not necessarily transfer between the two.” *Stakeholder 4*

“Through the partnership working and referrals and people knowing specifically, they’ve more easily been able to identify who the right partner is and who the relevant organisations are and streamline with some of those referral processes I think.” *Stakeholder 7*

However, one of the smaller partners reported less success in terms of referrals;

“I think one of the ideas was that people would be referred between us all. Well we’ve never had any referrals.” *Stakeholder 5*



### 3.2 Outcome 2 – service users benefit from accessing a holistic, person-centred advice service which addresses needs in a joined up way

As part of the awareness raising approach adopted, a monthly MAW newsletter was circulated to third sector support organisations starting in January 2015 and ending in August 2015. Regular networking events were held as a mechanism to learn about local service delivery and to create space for discussion of best practice. Stakeholders reported positive views about the networking events:

“The network meetings have been really good actually, I would say that’s been one of the best parts of the project. We’ve really got a lot of different people in the room; we had another meeting last week and actually it’s just given us a chance to have a chat to each other, find out what other people do, broaden our knowledge base, and I think that’s been extremely useful actually.” *Stakeholder 1*

“I think it’s just made everybody more aware of what’s out there. The workers in this building are now a lot more aware of the project and the website that the project has got, so I think they’ll use this as well as being able to refer on for the things we can’t deal with, so I think there’s more awareness of the other agencies out there and charities.” *Stakeholder 2*

“I think one of the strengths as well was to pull together people as a network so we got people talking, they were made aware of each, and were able to touch base about their latest activities or practice.” *Stakeholder 3*

“There’s a lot more networking, and everyone is talking to each another and making sure that everyone knows what they offer and the areas in which they work, then I think that’s been a really good success.” *Stakeholder 4*

Learning about what other advice providers were delivering was also described as a positive by some stakeholders:

“Well I think it was the first time that organisations had come together around advice giving and we found that advice goes on in lots of different ways. One of the things we found was there a real kind of spectrum of advice giving.” *Stakeholder 3*

“The project was starting off when I started my job so in terms of attending the meetings it was very useful in terms of meeting people and getting contacts. That was helpful for me finding out who people are and putting names to faces, actually speaking to people rather than sending anonymous emails to people in other services. People would say what they provide and what they do and that was useful and we’ve had referrals from there. It’s been useful to establish relationships with other people. [Name of MAW worker] has been really helpful sending information and arranging training courses.” *Stakeholder 15*

New partnership working relationships were also seen as a positive outcome:



“I wouldn’t have been able to do some of the work that I’ve been doing in the district without having those contacts and that network through MAW. It works both ways as the partners have referred people to me who they have been concerned about, to cover my specialty and what I can do for them, so I think it’s definitely think it’s created that holistic approach to services.” *Stakeholder 17*

One stakeholder was helped to meet their project targets as a result of the networking:

“Attended 2 quarterly meetings, I’ve met lots of partners and stakeholders from the MAW project and generated a lot of contacts for my project...it’s helped me network and tell my participants what is out there to refer people onto and signpost. A few of the partners that I’ve had more involvement with has led on to a number of workshops across the district, so it helped achieve my project targets as well as identifying people that we can work jointly with.” *Stakeholder 17*

Whether new partnership working relationships had an impact upon service delivery was open to question from the stakeholder perspective:

“I think it’s enabled us at a senior level to work more together. I think there’s still a little bit more that needs to be done with staff on the ground. So actually we never did add a lot of capacity to our service delivery but we’ve learnt a bit more about what each organisation does.” *Stakeholder 1*

Despite the partnership working that took place as part of the MAW approach being viewed in a positive way by several stakeholders, many were not sure that duplication in service delivery had been reduced;

“Having a one-stop shop that pulls it all together has been brilliant. It makes such a difference...people prefer it. If it were possible to improve it, I would have a broader range of advocacies under the umbrella. I’m sure it has stopped duplication of work because people understand the trouble with working together is that peoples’ first reaction is to feel threatened, but you’ve got to look at it as a way to specialise in what you’re really good at instead of covering your back with other things so that somebody doesn’t encroach in what you’re doing. So you can leave the things they want to do and let them get on with it and you can be really detailed and develop your own speciality. That makes sense to me.” *Stakeholder 16*

“I’m not sure if it’s reduced duplication, but I think what it may have done is that people may have got a response from somebody else sooner, yeah, the more appropriate organisation or agency sooner.” *Stakeholder 1*

One of the smaller organisations involved also cited capacity as an issue in relation to service delivery;

“What’s lacking really to make the project successful is more frontline workers really.” *Stakeholder 6*

Partnership working can also be problematic, and the MAW partnership approach did have some issues:

“One of our consortium partners didn’t engage quite as much as we probably would have liked them to.” *Stakeholder 1*

“I think there was a couple of agencies that we didn’t really get buy in from.”  
*Stakeholder 2*

“It was a partnership but we were all doing our own sort of thing within the partnership.” *Stakeholder 6*

One stakeholder argued that the project had potential to encourage working in a more holistic way but questioned whether the approach was realistic for services in Calderdale:

“It’s helped for people to get to know each other more, that gives the opportunity for more holistic working if you like. Calderdale have always wanted a one-stop shop for everything so to give information only once but the problem is that approach isn’t very realistic...different services need different information so collecting information centrally is going to be problematic. That may be part of the MAW ethos that isn’t ever realistically going to work in my opinion. Service users will have to tell their story to every organisation, otherwise you’re going to have an encyclopaedia of knowledge and every time you interview someone the list would be endless for the information you’d need to collect.” *Stakeholder 15*

In addition, the MAW approach involved delivering training to other local organisations that delivered advice and support. Thus, focused training was delivered to the smaller providers with the underpinning ethos that this would enable them to be better placed to provide more informed and relevant information to their clients. Stakeholders reported positive views about how MAW training had been useful in raising awareness:

“I suppose there’s a better understanding of what’s out there and who’s doing what.” *Stakeholder 3*

“I think it’s given my staff a better understanding of what other people are doing out in the sectors and where they can actually go for help. I think it’s alerted them to some of the difficulties other organisations are having to help people with. So, a much wider realisation of some of the problems refugees, asylum seekers and the homeless are having to cope with, which are probably not people that we come across very regularly. I think that wider appreciation has been beneficial for all.”  
*Stakeholder 4*

“I think it’s made a difference to clients, it’s a lot easier when you’re out there to pass on one contact and not 5. It also means that we don’t have to think who is going to provide the right advice here. One thing people hate is being passed from pillar to post, for some people making the phone call is a big deal and if they don’t get it right first time they won’t make the second call. To have an organisation that can say yes we’ve got the information here and we can get someone to ring you back and it’s brilliant.” *Stakeholder 15*

"It's very efficient to be able to tell our staff to speak to MAW...having to learn about the different advice and the different opportunities is a challenge so to have all of that pulled together has been great." *Stakeholder 15*

One stakeholder suggested that the training had enabled her to offer more informed advice to clients:

"If there was no Making Advice Work project it would use up a lot of our time and also we don't know where to signpost always, we just get on the internet to find information but most clients have depression problems so they are quite vulnerable and they wouldn't be able to talk to the debt advisor with their problems so they might just stay in the house with their problems. With this we can empower them and encourage them to solve their debts at an earlier stage." *Stakeholder 13*

"If I didn't go on that training I wouldn't be able to use the CAB website and through the training and information for the CAB I learnt lots around grants you can get for clients...I learnt that through the project I didn't know any of that before." *Stakeholder 13*

"We have a large demand of clients who need help with benefits and debt problems so working on the problem gave me more hours to work with clients. From working on the project I can support the clients to go for employment and help them to get debt advice from CAB." *Stakeholder 18*

One stakeholder expressed that volunteers from her organisation had attended training and found it useful.

"The training for the volunteers has been very useful in terms of how they could support women that were accessing services here. It made them more aware of services that are out there and how to link in with those services...the training was around debt advice which they found very useful. Our service users can come in with one issue but it's like peeling an onion there's layers and layers of issues and debt can be a significant issue." *Stakeholder 14*

One stakeholder argued that the training was not delivered in sufficient depth to make it applicable to their role.

"I attended a couple of the courses and didn't find them particularly useful from a worker perspective. The delivery and information was more appropriate for clients rather than advice workers delivering advice to clients and didn't explore in sufficient depth to meet my needs as an information worker." *Stakeholder 18*

However, it was noted that due to family and other commitments it was not always easy for volunteers to access the training:

“I think it’s about finding some kind of window of opportunity for volunteers to access these training sessions; for some volunteers who have children, early evening is more appropriate for them because they might have childcare issues whereas during the day they may not.” *Stakeholder 14*

In addition one stakeholder stated that there was very little training provided for volunteers.

“We use volunteers a lot and I thought there would be more volunteer training, I had a volunteer booked onto a course about filling in benefit forms but it was cancelled and they never told her. They didn’t run it again so that was a bit disappointing but that’s about it.” *Stakeholder 15*

Further feedback about the training that was delivered by MAW was sought via in-house evaluation. This feedback from an internally developed and administered questionnaire is presented below.

### 3.2.1 Making Advice Work Training Questionnaire

#### ***Making Advice Work Training Programme***

Overall, 71 staff participated in the Making Advice Work training programme (11 attended 1 session, 60 attended 2 to 9 sessions). All staff who attended the training were invited to complete an online evaluation questionnaire, administered via the online platform Survey Monkey, 3 to 15 months after the session. Nine participants who attended the training completed the MAW training questionnaire. Of these nine respondents, 88.9% considered the training ‘useful’ (n=5, 55.6%) or ‘extremely useful’ (n=3, 33.3%). One respondent felt it had ‘made no difference’ (see Figure 3.7 for a full breakdown of results).

Respondents were asked ‘what if anything, have you done differently because of the training?’ Responses related to increase in knowledge/ information sources and exchange of information:

“Shared up to date information with client group”.

“Have alternative information in hand to help solve the problems.”

Three respondents of 6 who answered the question, stated that as a result of the training they had ‘been able to help clients better or provide more advice’. Respondents reported the training helped them to support clients and learn about different sources of information:

“Learnt the ‘advice guideline’ website for checking information. Knowing the way to support clients when they need to face the bailiff regarding council tax debts”.



One respondent stated the training had not assisted them to 'help clients better or provide more advice' because they had "not been directly involved in advice since the training". A further three respondents reported 'other'<sup>6</sup>.

The MAW approach also involved the provision of events and networking opportunities for other service providers, alongside the establishment of regular project core meetings that were to serve as a vehicle for more joined up processes between partner agencies involved.

### 3.2.2 Event feedback

5 MAW networking events were held over the funding period, with 84 participants attending at least one event (number of events attended=1 to 5; mean number of events attended 1.4; SD=0.9). All participants who attended a MAW event were asked to complete an evaluation questionnaire following the event. Two questionnaires were designed by MAW for completion: 1) for all delegates (hard copies of the questionnaire were completed immediately following the event); 2) for delegates who previously attended the training (sent out to all delegates who had previously attended the training to complete via Survey Monkey).

Figure 3.6 – A MAW Event held in May 2015

---

<sup>6</sup> Multiple responses resulted in 7 responses from 6 respondents.



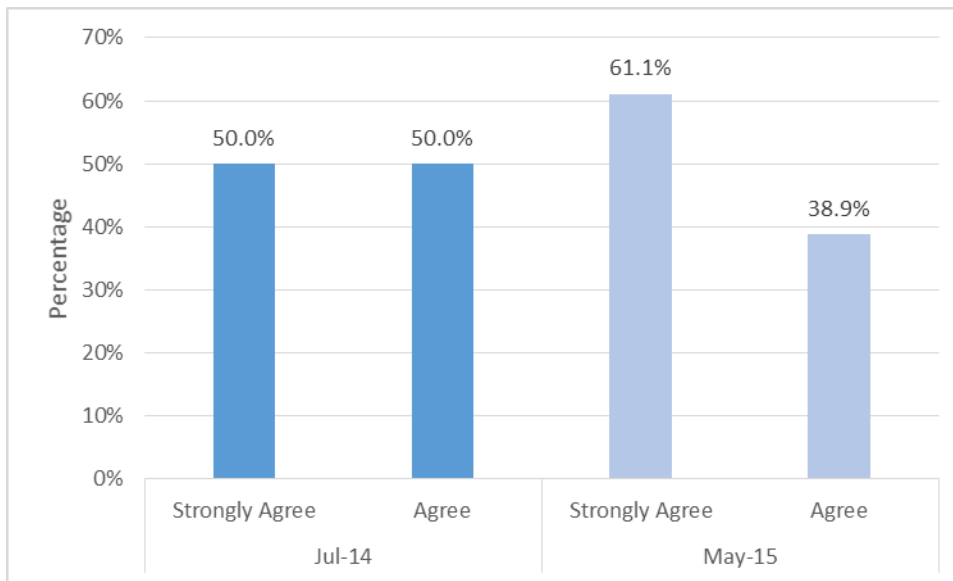


### Questionnaire: all invited delegates

Evaluation data for events in July 2014 and May 2015 were collected<sup>7</sup>. A total of 45 participants (July 2014=27 and May 2015=18) completed evaluation forms.

Overall, MAW events were viewed positively. Half of all respondents (50%) strongly agreed with the statement 'I found the event useful' and a further 50% agreed (see Figure 3.7 for a full breakdown of results by event). Three respondents did not answer the question.

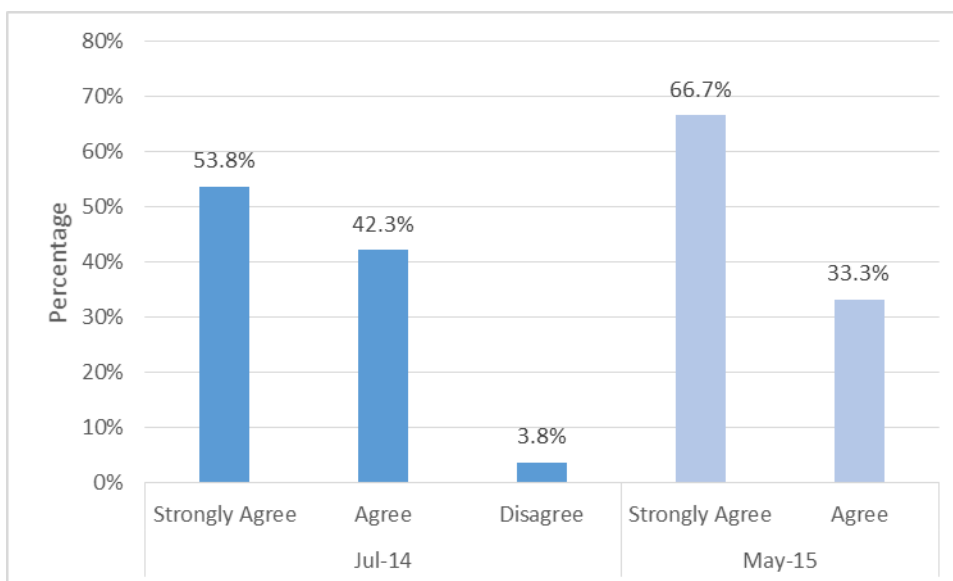
<sup>7</sup> Evaluation forms varied for events



**Figure 3.7. I found the event useful: strongly agree, agree, neither agree nor disagree, disagree, strongly disagree**

In addition, respondents who attended the May 2015 event were asked to report how relevant the event was to their day-to-day work. 94.4% of respondents stated the event was relevant to their day-to-day work (very relevant=55.6%, 38.9% quite relevant), whilst 1 respondent believed the event was neither relevant nor irrelevant. Notably, all respondents at this event felt more confident in referring to other services as a result of the training (83.3%= a lot, 16.7%= a little).

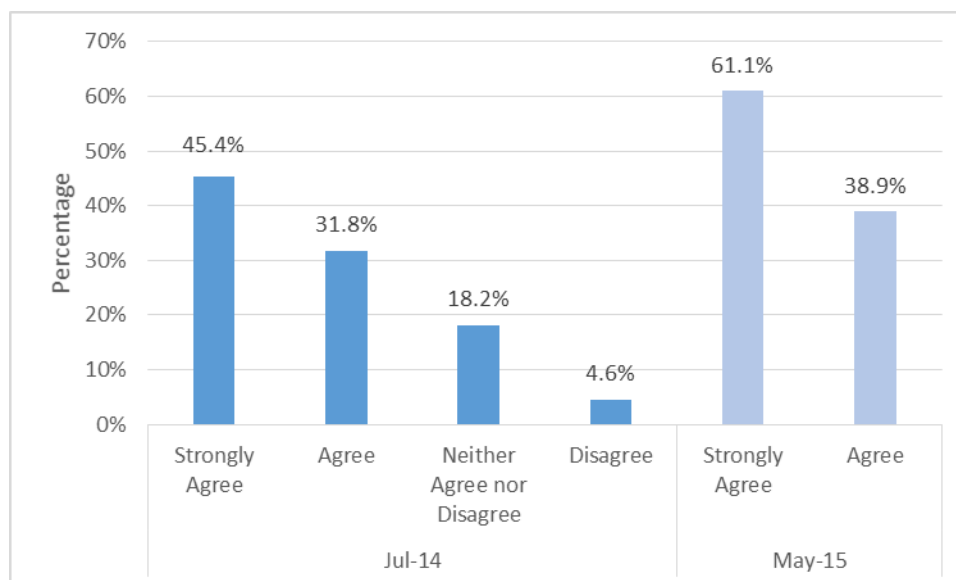
Moreover, nearly all respondents (97.7%) strongly agreed or agreed with the statement 'the event allowed me to network with a variety of people. One respondent disagreed (data was missing for one participant). See Figure 3.8 for a full breakdown of results by event.



**Figure 3.8. The event allowed me to network with a variety of people: strongly agree, agree, neither agree nor disagree, disagree, strongly disagree**



All respondents were asked to state their interest surrounding increasing their knowledge of 'the (Social Impact Tracker) SIT and reporting outcomes'. 87.5% of respondents agreed or strongly agreed that they would 'like to know more about the (Social Impact Tracker) SIT and reporting outcomes'. One in ten (10%) neither agreed nor disagreed and 2.5% disagreed (data was missing for 5 respondents).



**Figure 3.9. I would like to know more about the (Social Impact Tracker) SIT and reporting outcomes: strongly agree, agree, neither agree nor disagree, disagree, strongly disagree**

One of the approaches used within MAW was the trial of a Social Impact Tracker database system. The aim of this was to provide details about clients' journeys, and thus to be able to evidence the impact of any advice provided. WomenCentre led on this aspect of the work, and provided training to one of the smaller partner agencies who had agreed to implement the social impact tracker system, and to use it. However, there were several issues with this approach as reported by partners involved in the implementation:

"We had hoped to be able to track people by using the social impact tracker and all inputting into one data set, but that wasn't going to work because CAB have got their own (system) and Age UK have got their own so that was never going to work 'cos it would've been duplicating and people didn't want to duplicate." *Stakeholder 1*

"We all hoped that we could have one system where we could all use the same sort of system for data and we've realised that we couldn't do that so the social impact tracker that the Women's Centre have used we couldn't use 'cos it would have meant duplication for us and I think it was the same for others." *Stakeholder 4*

"That's where it's come a cropper really because it has been, they have realised that really we all keep different statistics we've got different databases and it was just never going to be possible to put them altogether, you'd be looking at a massive, massive operation to do that kind of thing." *Stakeholder 5*

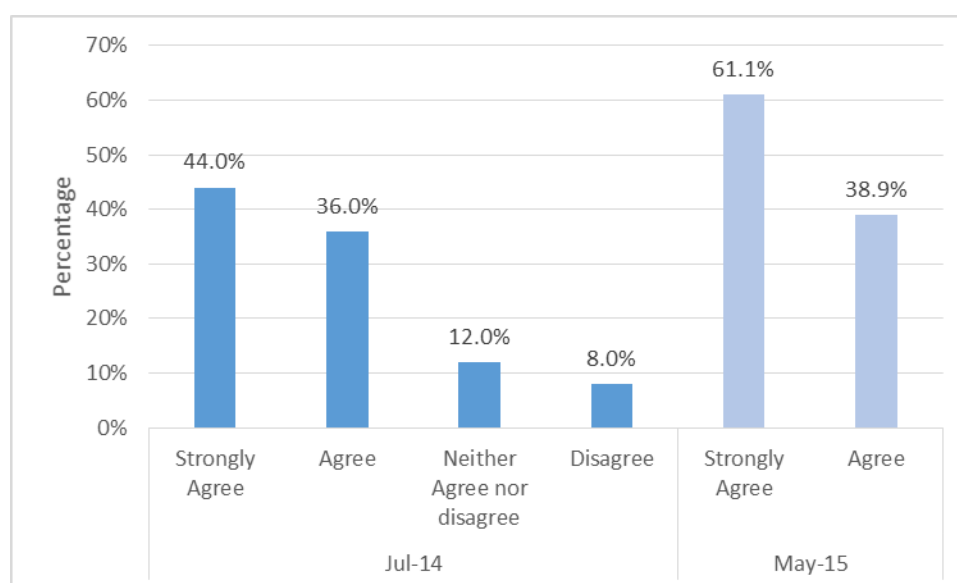
This resulted in the social impact tracker only being used by some of the partner such as WomenCentre and DART. There was also an issue of smaller organisations being unable to fund licence fees for the social impact tracker system.

Respondents who attended the July 2014 event were asked if they 'would be interested in attending a session around using the internet to find appropriate advice'. Two thirds (66.7%) of respondents strongly agreed or agreed with the statement. A further 20.8% of respondents neither agreed nor disagreed and 12.5% disagreed (data was missing for 3 respondents).

All respondents who attended the July 2014 event strongly agreed (44.4%) or agreed (55.6%) that 'it would be useful to organise more events like these in the future'.

Over 8 in 10 (83.3%) respondents who attended the May 2015 event reported to be interested in attending future MAW training events (61.1% definitely, 22.2% a little), whilst 2 respondents were unsure (11.1%) and one (5.6%) stated 'no, not really'.

Just over half of all respondents (51.2%) strongly agreed that the day and time of the event was convenient and a further 37.2% agreed. 7% neither agreed nor disagreed and 4.6% disagreed (data was missing for 2 respondents).



**Figure 3.10. The day and time of the event was convenient: strongly agree, agree, neither agree nor disagree, disagree, strongly disagree**

### **Additional questions completed by delegates who had previously attended the training**

Five out of five respondents who attended the Making Advice Work events considered the events 'useful' (n=4, 80%) or 'extremely useful' (n=1, 20%). Positive comments provided regarding the events related to opportunities for networking and increased knowledge:

"Networking, sharing information and finding out what is available."

“It was good to meet other representatives from other service providers.”

Of the five respondents who had used the Making Advice Work website, 80% considered it ‘useful’ (n=3) or ‘extremely useful’ (n=1), with one respondent stating “I have used the site for clarification of information”. One respondent felt it had ‘made no difference’ to them.

### **3.3 Outcome 3 – advice services across Calderdale will be better resourced on a sustainable footing, ensuring that people continue to have access to the help that they need**

Age UK completed a report investigating methodologies to generate fees from new business as part of the MAW approach to ensuring sustainability going forward. This involved seeking support from local businesses. However, despite exploration of this, no new fees were generated and partners acknowledged the difficulty of securing finance in this manner particularly because none of the partners involved had dedicated support. The MAW project was also time-limited and developing new business from existing services requires time, as well as investment:

“We have had some success in getting businesses to do things in kind like some advertising and some re-design of websites, but we haven’t had masses of donations or somebody saying ‘well I’ll pay you £5000 to come and sit in our staffroom once a month to talk about advice’, perhaps was a bit naïve but that’s what we were hoping for.” *Stakeholder 4*

Indeed, one potential area for development that was considered by the partnership was models of social enterprises. However, this aspect of the work had to be put on hold due to a lack of staff capacity. Despite this issue with financial sustainability, many of the partners involved in MAW did report that in working together, some additional resources were in the process of being secured. A notable success was that the partnership secured a £98,000 funding bid for a 2 year period (April 2015-April 2017) that will enable them to develop financial resilience within the Calderdale area. The remit of this work is to provide advice related to budgeting and food skills for those who are the most vulnerable within the community. According to those involved without the work of the MAW project, this bid would not have been submitted;

“We built in sustainability because we managed to get funding from the local authority, which will enable us to keep the consortium approach going through a financial resilience project....So I don’t think we would’ve been doing that if we hadn’t had the Making Advice Work.” *Stakeholder 1*

“The thing we have done through the project is convince other grant bodies to reinvest in us so the council have put some money into another project as a result of the partnership and we’ve gone forward with a new big lottery bid as a result of the partnership.” *Stakeholder 4*

For some stakeholders, the partnerships created during MAW were the start of a process that was likely to enable those involved to be able to make better use of limited resources in the future:

“There’s been a spirit of a different sort of spirit of partnership working. Whereas in the past, organisations might have just gone on their own for certain parts of funding... we don’t want to fight against each other and in fact it’s better if we try and do it together, and we’ve supported each other, and I think that’s been really positive.” *Stakeholder 1*



“I think all that we can hope is that from what we’ve built up and the good relationships and the multi-agency working with the other agencies is, although there’s no money there, that we keep that up, keep referring in and out, we just keep doing that.” *Stakeholder 2*

“I suppose one of the things that changed was that people came around the table and started to talk about what was going on within their organisations in a bit more of a useful way than they had done, I suppose one of the other good things that’s come out of it is as partners they’ve recognised the value of bidding and delivering as partners, so there’s some, small scale project work but it is starting to move up to a lottery level where they’re coming together.” *Stakeholder 3*

“I actually think from the sustainability standpoint that the success of the project has been largely around everybody talking to everybody else and making sure that the achievements that they’ve got and the connections that they’ve made will continue rather than just sort of drop off the edge of the agenda.” *Stakeholder 4*

One stakeholder stated after the end of the project there would be little opportunity to network with the organisations and suggested an online forum would be a good way to continue the work of the project:

“It’s a shame it’s coming to an end because there is no other facility to get everyone together like that so there is going to be a gap where people don’t know what other people are doing, potentially isolated and vulnerable people won’t be able to get the access that they need to different services so I do think that it’s a shame that it’s not continuing. Anything that could fill the gap of that, an online forum or something similar.” *Stakeholder 17*

Another stakeholder argued that the wider context in which the partnership was operating was an issue in relation to secure future funding:

“Well the whole country’s austerity mad at the moment, the opportunities for finding funding for services such as ours are getting more and more difficult. I think there was talk of maybe charging clients that was thrown into the mix, we explored that early on I seem to remember, but then we are dealing with lots of people that are at the bottom end of society, doubly disadvantaged through disability and very low income, so to ask somebody in that situation to have to contribute, well they might be coming to you because they’ve got no money for a start.” *Stakeholder 6*

Other stakeholders felt that more of a focus, and more time were required in relation to sustainability:

“I think you’d need kind of a clearer vision to help in terms of sustainability.” *Stakeholder 7*

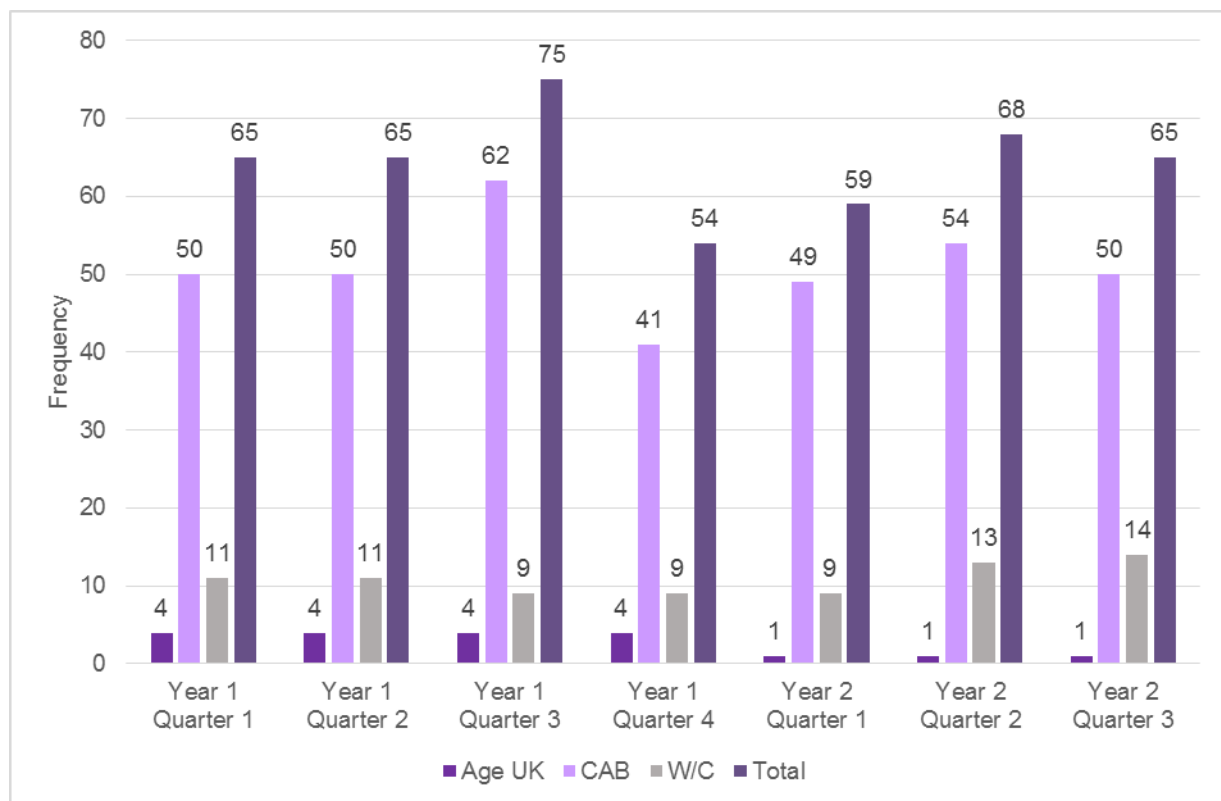
“I mean I think nationally one of the criticisms has been and anybody would realise that it was quite ambitious to think about sustainability within the time frame.” *Stakeholder 3*

The DART manager also made the point that there were some monetary gains as a result of MAW that can be used as a measure of the level of return on investment. Thus, over the life of the project the DART worker was able to maximise benefit of £245, 432 which will go back to individuals and potentially the local economy. This was the result of ensuring that individuals were able to fully claim all of their benefit entitlements.

Part of the plan for increasing resources involved recruiting and training volunteers. By focusing upon providing more relevant and effective training courses, it was envisaged that there would be improvements in the contribution from volunteers. Furthermore, additional publicity created as part of MAW was also used to develop the volunteer contribution and increase volunteering opportunities.

### 3.3.1 Volunteer monitoring data

Volunteer data was recorded for Age UK, CAB and WomenCentre. On average, 64.4 individuals volunteered each quarter (range=54 to 75 volunteers). The majority of individuals volunteered for CAB. In total, volunteers worked 24,826.5 hours. For a breakdown of volunteer numbers by organisation please see Figure 3.11.



**Figure 3.11. Number of volunteers per quarter**

However, there were varied experiences of volunteering reported from partner agencies, with some reporting positive experiences and others reporting difficulties;

“The other thing that’s worked well as well is the organisation, part of it was to have volunteers...we’ve had a couple of really good volunteers here, now they’ve been supporting us in our wider work

around our finance and things like that within the organisation but they've come through the Making Advice Work project and they're a high quality level of volunteer and that's worked well for us as an organisation." *Stakeholder 1*

Part of the evaluation research also involved collecting data with some of the volunteers who had been involved in MAW. This aspect of the evaluation evidence is limited due to the small number of volunteers who agreed to be interviewed during the time frame of the evaluation. However, the data gathered from the volunteers illustrated that MAW was useful to help unemployed people obtain a volunteering role, in order to gain both experience and skills to enable them to get paid employment.

One volunteer had a seamless process; she was interviewed by MAW, picked her volunteer project and was volunteering for the organisation within a week. The same volunteer said the volunteer experience she gained helped her to feel less isolated and helped her to learn skills within the workplace. Having a role within an organisation encouraged her to apply for jobs and after 6 months in her volunteering role she obtained a full-time job in a different organisation. The only drawback of volunteering was having to pay for the childcare of her two young children.

Another volunteer had a positive experience of MAW initially as he was interviewed by the project manager, and felt that this process was beneficial in highlighting his strengths and providing him with information about different organisations where he could possibly volunteer. He chose to volunteer with Age UK and was put in contact with an Age UK worker very quickly. Unfortunately, the worker was away on holiday for a month and by the time the worker returned the volunteer had found full-time work. He suggested that the MAW project should only signpost volunteers to organisations that are ready to recruit volunteers immediately.

The final volunteer that participated in the evaluation worked on the MAW work project by running the Facebook page. He was able to use MAW as a reference when he applied for a job. He noted that since he left, the Facebook page has not been updated.

These volunteer stories document different experiences of MAW. However, these cannot be taken as representative given the low numbers of volunteers who participated in the evaluation.

### *Key findings – Project outcomes*

- The MAW project enabled the organisations involved to publicise their activities both within Calderdale advice services and to others outside of the sector. The increased publicity resulted in increased client numbers, the increased use of online resources and increases in the use of the advice telephone line.
- The MAW project involved the creation of a specific website that was viewed as successful by partners based upon the number of visits recorded, and the increased accessibility of information available on the web-pages. This Tier 1 information and advice was pulled together in one place by the MAW team as a resource that could be used by non-specialists to support them in the provision of basic advice.
- Clients predominately sought specialist advice relating to ‘benefits/ tax credits’, ‘health and social care’, and ‘family and relationships’. Client satisfaction was taken as a measure of service users having their needs met in a holistic way. Of the clients asked, 97% reported getting the advice, help or support that they needed, thus highlighting service impact on clients and the potential wider impact on family and relationships.
- Some partners involved in MAW reported changes in referral patterns between agencies involved in advice provision and cited this as a successful aspect of MAW.
- Partnership working was reported as a success by most of the partners involved in the MAW project, despite some partnership benefits not being anticipated at the outset of the project. However, this was not accompanied by reduced duplication in terms of service provision. The application of a universal model was not possible given that each partner involved in the MAW project operated with different models of delivery. For example, some partners only delivered advice whereas others delivered advice and support.
- Monitoring the outcomes achieved during MAW proved to be more difficult than anticipated, with the use of a Social Impact Tracker not taken up by the smaller organisations involved with the project. Using an Outcomes Star as a universal measure was also not applicable given the different levels of support offered by various partners. Furthermore, partners did not make changes to their internal



systems in order to effectively monitor referrals between agencies. These issues made it challenging for partners to report with consistency on their work.

- The training and events provided during MAW was positively evaluated by those participating in it, and by the partnership delivering the project.
- Sustainability drawing upon local business involvement was not achieved. However; the partnership was successful in securing future grant funding.
- The use of volunteers within MAW changed during the implementation of the project and partners had mixed experiences in relation to volunteering within their organisations. Volunteers also reported a range of experiences, with some being more positive than others. Positive benefits included increased understanding of services provided by other organisations, and increased awareness of the problems encountered by service users.

#### 4. Learning from Making Advice Work

- Networking events were particularly welcomed by many who attended them, and these were reported by partners as being useful and one of the most successful aspects of the MAW project.
- The MAW project created the opportunity to develop greater awareness and understanding of the issues that exist when delivering specialist advice training to partners.
- The creation of a partnership to deliver MAW was successful on a number of levels; in terms of enhancing knowledge in the local area about advice provision, the complexity of client problems and the associated need to therefore address these holistically, as well as providing a platform for future working together. Sustainability can be enhanced through improved partnership working. The approach used within MAW where each partner was allocated a work stream was transparent however, attention needs to be paid to resource levels within smaller partnerships to ensure equal buy in.
- Flexibility is required in delivering programmes such as MAW. The project (with the support of funders) was able to shift its direction at the mid-point of delivery because of changes encountered during the initial phases. This resulted in a different focus; for example in relation to the use of monitoring processes and the role of volunteers.
- The skills and abilities of project managers are an essential element of implementation success. Projects such as this which require complex partnership management will be challenged to succeed without project management and appropriate co-ordination.
- When multiple partners are involved in any given project, developing a collective monitoring system can be challenging. Learning experienced during the delivery of MAW suggests that a different model and approach would be required in future work. Partners had not appreciated the level of one to one support and development needed in relation to the implementation of a new monitoring system particularly within smaller organisations.

## 5. Conclusion

This is the final evaluation report which seeks to evaluate the impact and process of delivering The Making Advice Work project, with a specific focus upon how the project has met its outcomes. This report shows that MAW was successful in the creation of a working partnership for delivery, in providing training and networking opportunities for those involved in advice provision within the Calderdale area and in raising awareness of the complicated nature of client's needs.

However, the project's journey from inception to present day reflects a need to revise its terms of delivery. This was due to recognising the need to raise awareness amongst local service providers whose assumed knowledge at the outset was less than anticipated; the need for increased capacity and associated advice delivery in local organisations and the need to work more realistically with volunteers.

### 5.1 Issues for consideration

- When working in partnership across services and providers, attention needs to be paid in advance to the routine collection of monitoring data across the life-time of a project, particularly with regard to evidencing outcomes. Streamlining data recording procedures to avoid duplication and using tools that work for everyone would have enhanced the evidence related to MAW.
- Evaluation should be planned from the outset in order to ensure a clearer mapping of project outcomes. An evaluation framework should be developed at the outset alongside the commencement of delivery as this would provide a more complete picture.
- Attention needs to be paid to the capacity of staff within existing organisations in relation to their ability to engage with a new approach, to participate in available training and to deliver services in a different way. Not all partners involved in MAW had the same capacity or staff levels throughout the project life-time.
- The nature of volunteer roles as well as volunteer capacity also requires consideration. Volunteers are often not a solution to enhancing staffing capacity and/or delivery, as they may require investment, support and training even if they are available to give their time.
- The MAW project was successful at a partnership and managerial level; however, engaging front-line workers was more difficult. Hence, in future delivery the challenges of engaging front-line workers with project aims and activities requires more consideration to increase impact.

## 6. How we did the research

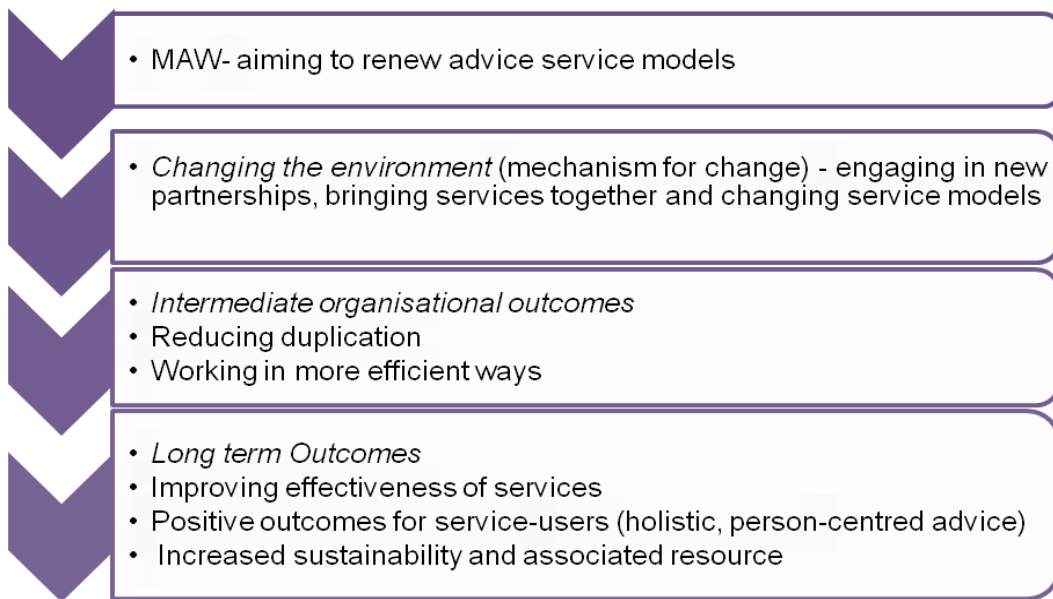
The evaluation was conducted by researchers from the Centre for Health Promotion Research in 2015-2016. The evaluation used a mixed method approach including qualitative data from interviews with stakeholders, interviews with volunteers and desk-based analysis of monitoring data. The evaluation sought the views and experiences of staff and volunteers in order to ascertain the extent to which the project had met its outcomes. The overarching aim of the evaluation was to ascertain the extent to which the MAW project's aims and objectives had been met. The specific objectives of the evaluation were to:

1. Assess the extent to which the sector has transformed through renewed service models
2. Ascertain the impact of the project in relation to bringing services together to reduce duplication and work in more efficient ways
3. Explore the effectiveness of the project from a stakeholder perspective in terms of:
  - a. Measuring the differences that services can make to people's lives;
  - b. Enabling service users to access a holistic, person-centred advice service that can address multiple needs
  - c. The impact of the project in relation to future sustainability and associated resources

### 6.1 Theory of Change

The evaluation also tested the programme's 'Theory of Change' (Judge and Bauld 2001). This makes explicit the links between programme goals and the different contexts and ways in which the project works. It provides a framework for mapping subsequent outcomes and outlining how these fit with the overall objectives of the MAW project.

Figure 6.1 – Theory of Change for Making Advice Work



## 6.2 Approach to gathering evidence

### Qualitative data collection with stakeholders

7 semi-structured interviews were conducted with key stakeholders who had been involved with the delivery of MAW by the evaluation team. An interview schedule was developed in line with the objectives for the evaluation and broadly covered the following key areas: the project background, the approach adopted within MAW, the changes that had taken place as a result of MAW, the impact of the project on service users, sustainability and any aspects of learning during the project delivery (see appendix 1 for the interview schedule).

A further 5 telephone interviews were conducted with wider stakeholders who had been involved with different aspects the project. These included people who had attended training or events or were steering group members. In addition 1 wider stakeholder provided written feedback via email.

### Qualitative data collection with volunteers

The evaluation team were also provided with contact details for 7 volunteers who were recruited to the project. Out of these 7 who were recruited, 1 agreed to a telephone interview and 1 gave feedback via email. The other 5 did not respond despite contact being initiated via email, text and voicemail with messages being left in instances where the team had contact numbers (see appendix 2 for the interview schedule).

## **Desk-based analysis**

The aim of the desk-based analysis was to provide a rigorous synthesis of monitoring data collected by MAW partners during the life of the project. The primary data sources were the demographic data collected during the life of the project, project monitoring data related to training, events, and evaluation questionnaires with customers and learners, project funder reports and project reviews. Data from each of these sources were extracted and analysed systematically, using framework analysis.

For all qualitative methods used, framework analysis was used. Framework Analysis develops a hierarchical thematic framework to classify and organise data according to key themes, concepts and emergent categories. The framework is the analytic tool that identifies key themes as a matrix where patterns and connections emerge across the data (Ritchie et al., 2003). The matrix was constructed using the aims of the evaluation.

All quantitative tools were designed and data collected by MAW and partner organisations. Quantitative data was cleaned and imported into Excel or SPSS for analysis. For the purpose of this report, descriptive statistics were generated.

## **6.3 Research ethics**

The evaluation was given ethical approval through Leeds Beckett University ethics procedures. The following practices were adhered to ensure ethical rigour. Informed consent – written consent was obtained from all participants who were interviewed. Confidentiality and anonymity – no personal identifying information has been used in the reporting the data. Secure information management – security was maintained through password protected university systems.

## **6.4 Limitations of the Evaluation**

The evaluation sought to identify and bring together a range of perspectives in order to highlight what works and what might be done differently. Nevertheless, like any piece of work, there are limitations to what could be achieved. The evaluation team were reliant on Making Advice Work staff for access to stakeholders, volunteers and data. The data would have been richer had the evaluation team been able to speak to more volunteers, and if they had been able to include the views of service users however, this was beyond the scope of our remit. The evaluation was also conducted at the end of the project life-span. As a result the focus was short term rather than throughout the life of the project, which again may have limited the findings. Finally, the evaluation team worked with the MAW in-house monitoring information collected during the project however, as already stated earlier there were several gaps within this data set which again limits the conclusions that the evaluation team were able to draw.

## 7. References

Gathergood, J. (2011) Demand, Capacity and Need for Debt Advice in the United Kingdom Nottingham, University of Nottingham available at [http://www.moneyadvicetrust.org/SiteCollectionDocuments/Research%20and%20reports/demand\\_and\\_capacity.pdf](http://www.moneyadvicetrust.org/SiteCollectionDocuments/Research%20and%20reports/demand_and_capacity.pdf) (accessed 2.2.2016)

Cabinet Office (2012) *Not For Profit Advice Services* in England Whitehall, London.

Judge, K. & Bauld, L. (2001) Strong theory, flexible methods: evaluating complex community-based initiatives. *Critical Public Health* 11, pp.19-38.

Ritchie, J., Spencer, L. & O'Connor, W. (2003) 'Carrying out qualitative analysis' in Ritchie, J. & Lewis, J. (Eds) (2003) *Qualitative research practice: A Guide for Social Scientist Students and Researchers*. Pp. 219-262. London: Sage.



## 8. Appendices

### Appendix 1 - Stakeholder Interview Schedule (face to face/telephone)

#### Introductions

Stress that we want to talk about the project in a general way rather than trying to obtain specific information about any of the service users involved. If names or identifying factors come up in the conversation then reassure that the information will be anonymised.

#### *Background/Introductory information*

Please could you tell me about your role/what you do?

How are you connected to Making Advice Work Project?

Can you describe Making Advice Work approach?

#### *Probes:*

What makes it unique?

Do you think it is effective? If so, how and why (what features make it so?)

What do you think has changed as a result of Making Advice Work?

#### *Probes:*

Have there been any changes in relation to the way that services have been delivered?

Can you describe the service model that has been implemented as a result of Making Advice Work? How is this different to previous models?

Has Making Advice Work resulted in more efficient ways of working? Can you provide me with an example of this?

Has Making Advice Work reduced duplication (in relation to service provision)?

Can you provide me with an example of this?

How do you think the project has enabled service providers to work together in new/different/alternative ways?

What is your experience of working within this new partnership model? Could you describe the benefits? Were there any issues/disadvantages?

How do you think the project has supported service users?

#### *Probes:*

Is this 'new' support different in any way to previous provision?

Do you think that the project/new service model has made a difference to the lives of people? Can you provide an example of this? What are your thoughts on how this can be measured/captured?

Do you think there is any evidence of services working in a more holistic way? Has the project enabled service providers to work differently with people who have multiple needs? Any examples?

Given that this project has been relatively short-term funded, what are your thoughts about the impact of the project in terms of sustainability?

#### *Probes:*

What about future resources for work such as this?

Can you tell me about any learning that you have experienced in your role as part of Making Advice Work?

*Probes:*

Is there anything that you think should have been done differently?

What have been the important lessons for you as a practitioner?

*Closing questions*

Is there anything you would like to say about Making Advice Work which we have not discussed/talked about?

Thank you for your time etc., etc.

## **Appendix 2 – Volunteer Interview Schedule**

1. Please could you tell me about your role on the Making Advice Work Project?
2. How did you become a volunteer for the project?
3. Can you describe Making Advice Work approach? (What does the project aim to do?)
4. Do you think it is effective? If so, how and why (what features make it so?)
5. Have there been any benefits for you volunteering on the project?
6. Have there been any drawbacks?
7. What do you think has changed as a result of Making Advice Work?
8. Have there been any changes in relation to the way that services have been delivered?
9. How does the project support service users? Is this different to what other services offer?
10. Given that this project has been relatively short-term funded, what are your thoughts about the impact of the project in terms of sustainability?
11. Can you tell me about any learning that you have experienced in your role as part of Making Advice Work?
12. Is there anything you would like to add about Making Advice Work?