

Advice Services Making a Difference

Demonstrating our Impact



Conference Report

**Advice Alliance East Midlands conference
Leicester – 3 March 2011**

Introduction

Kathryn Burgess – Chair, Advice Alliance East Midlands

Advice Alliance East Midlands was formed in 2008, bringing together advice networks in the East Midlands. The members of Advice Alliance are:

- AdviceUK
- Age UK
- Citizens Advice
- Disability Law Service
- East Midlands Money Advice
- Refugee Forum
- Shelter

The Law Society is an associate member of the alliance.

AAEM brings together networks that operate at a regional level in the East Midlands, to improve learning from each other, share resources and make the case for advice to those who have the power to fund advice services by:

- Helping them understand how advice can help them improve their services;
- Helping improve quality in advice provision; and
- Promoting collective thinking and collaborative working across advice organisations.

The alliance recognises the diversity of the advice sector and the strength this brings to the sector's ability to serve a wide range of needs effectively. As a group, we respect and work with the differences between our organisations.

Since 2008, the alliance has agreed its working methods and developed a communications strategy. As part of this strategy we have produced a one-page flier outlining what the alliance is and what we aim to do. In 2010 we produced **Engaging the Independent Advice Sector to Unlock the Potential in Local Communities**, a leaflet making the case for supporting advice, which was sent to all top-tier local authority Chief Executives in the region (county and unitary councils), resulting in some follow-up meetings.

The alliance is shortly to publish an **Advice Proofing Framework**, which is designed to help public bodies with their impact assessment of a new strategy, policy or procedure. The framework identifies the impact of the initiative on the advice and information needs of their local community, and encourages them to engage with local advice organisations to minimise the impact on service demand.

The documents referred to in the introduction are all available from Advice Alliance East Midlands by contacting Simon.Johnson@adviceuk.org.uk

The current context and why evaluation is important

Mark Sefton, independent researcher

Mark outlined the challenges facing the advice sector as pressure on public spending intensifies and with the prospect of significant elements of social welfare law being taken out of scope for Legal Aid. Advice services face increasing competition for funds – both from other advice providers, including large private sector organisations, and from other services such as social care or children’s services, which are statutory duties or may command more political capital.

Advice services have traditionally measured the volume of work, the outputs of their activity (benefit gain or debt re-scheduled or written-off) and client satisfaction, but increasingly, this will be inadequate to make the case for supporting a non-statutory service like advice in an increasingly competitive environment.

Effective evaluation and demonstration of impact is crucial to being competitive, but also, as consortium bidding becomes more common, being able to demonstrate the ability to deliver will be an essential part of due diligence – building confidence amongst potential partners.

As funding sources become more competitive, so the importance of demonstrating the outcomes of the work and the impact it achieves will increase. But client outcomes and impact only tell part of the story: services need to be thinking in terms of the economic impact of their work – how can they contribute to savings to the exchequer?

Mark outlined an evaluation in which he had been involved in which Age UK’s advice and information service funded by British Gas was evaluated to identify the value of the investment. A key lesson from this exercise was that the evidence demonstrated that the most expensive service model was also the most effective. By putting figures to this evaluation, it was possible to demonstrate the added value of that investment.

Lessons from the national outcomes pilot

Shanta Bhavnani, Advice Services Alliance

Shanta outlined the outcomes pilot she had led, which was part of the BIG Lottery funded *Working Together for Advice* initiative, involving ASA, AdviceUK, Age UK, Law Centres Federation, Citizens Advice and Youth Access.

The project recognised that advice services have experience of measuring advice outcomes, in terms of:

- Benefit gains
- Debt managed
- Housing protected, etc

And sought to identify ways in which advice organisations can understand and demonstrate client outcomes – the effect their intervention has on the client and her/his family’s:

- Health
- Levels of stress
- Quality of life.

Shanta outlined some of the key learning from the pilot:

- There are a number of ways of measuring and demonstrating outcomes – a one-size-fits-all approach is not appropriate and agencies should identify the method that will work best with their client group and the results they achieve.
- It is important to recognise the value of 'distance travelled' and this can be done either by asking clients to complete a baseline exercise at the start of the advice intervention and a follow-up at the end or – and this was more successful in the pilot – asking clients once at the end of the intervention and asking them to think back to how things were before they sought advice.
- Clients were happy to take part and felt that contributing their views on the outcome of the advice gave them the opportunity to give something back for the help they had received
- Outcome monitoring is resource-intensive. However, there are real benefits not just for the organisation but in terms of staff morale.
- The learning from the pilots and the tools developed are available [on the ASA website](#). These include example questionnaires and a spreadsheet to collate and analyse the results.

Morning workshops

What difference does your organisation make and how do you measure and demonstrate impact?

What difference do we make?

Workshops identified a number of outcomes achieved by the provision of independent advice services:

- Immediate advice outcomes
 - Financial gain, debt managed, etc
 - Homelessness prevented
 - Employment protected
- Client outcomes (client and family)
 - Physical and mental health improvements (reduction in fear and tension)
 - Improved relationships
 - Resilience and independence through having options and informed choice
- Funders
 - Advice contributes to funders' priorities
 - Reduced costs by avoiding problems arising / escalating
 - Good PR and potential benefits for own workforce in accessing advice
- Policy outcomes
 - Influencing / changing public policy, practice or service quality
 - Giving clients a voice to influence change
- Wider economic / social value
 - Volunteer involvement / training leading to improved employability
 - Supporting the local economy through income maximisation. People on low incomes spend more of their money on local services and in local shops
 - Reducing demand on the public purse – health, criminal justice system, etc

- Reduction in poverty and greater social cohesion / community involvement
- Wider economic and social benefit – Social Return on Investment / Triple Bottom-Line.

Most advice services would recognise the above outcomes as areas on which their service has a positive impact. However, the key challenges remain: how do we know and how do we evidence the change we make?

Who benefits from independent advice services?

Clearly, clients of the service and their families are the key beneficiaries, but it is crucial for advice organisations to be able to demonstrate to policy makers, funders and potential partners the contribution they make to the achievement of their priorities. This can be a challenge and organisations need to think through clearly what their purpose is, the case they want to present and the audience with which they need to communicate, prior to setting up their monitoring and evaluation systems. Whilst Community Budgeting is intended to integrate local public service funding to meet shared objectives, there is still a silo mentality with public funding, so making the case for reducing demand on public spending on health to a local authority may have limited impact. There is also a real challenge in apportioning the contribution of advice to the achievement of an outcome, as opposed to other interventions or factors.

How do we demonstrate our value?

A number of approaches were discussed, which can be summarised as follows:

| Outputs / Client Outcomes | Wider Outcomes | Social Impact | How Measured | |
|--|--|---------------|---|---|
| Number of people assisted | | | <ul style="list-style-type: none"> • Case management systems • Project reports | |
| Money raised – annualised benefits gains / lump sums | | | | |
| Levels of debt managed / written off | | | | |
| Tenancy preserved / homelessness prevented | | | | |
| Employment sustained | | | | |
| | Reduction in stress | | <ul style="list-style-type: none"> • Client surveys • Focus groups • Client feedback questionnaires – managed by volunteers • Quantitative phone interviews • Online – Survey Monkey | |
| | Improved mental health | | | |
| | Improved confidence | | | |
| | Greater independence and resilience | | | |
| | | | Reduction in (re-)offending | <ul style="list-style-type: none"> • Questions on impact – eg how additional money is spent • Questions about economic / community activity – accessing formal learning, employment, volunteering, etc • Use of case studies |
| | | | Economic activity and stronger local economy | |
| | | | Community cohesion | |
| | | | | |
| | | | Improved confidence through volunteering | |
| | Enhanced skills, experience and employability through volunteering | | | |
| Customer satisfaction | | | <ul style="list-style-type: none"> • Immediate post-card 'happy-sheets' • Customer feedback forms | |

Challenges

A number of key challenges were identified in gathering evidence to demonstrate the impact of advice services:

- Time and resources
- Funder requirements and the complexity that stems from multiple funding streams and confused or conflicting monitoring requirements
- Perceptions in organisations and resistance to monitoring
- Vulnerability and/or reluctance of clients to take part, and the relatively short-term nature of the relationship with clients.

How to address the challenges?

- Work with other local advice organisations on monitoring and evaluation and pool resources to do it collaboratively
- Use examples – eg from ASA website – and share what works.
- Look at opportunities to involve volunteers and/or students
- Integrate impact measurement into every aspect of the service.

One of the key factors affecting staff and client attitudes is the motivation for monitoring and evaluation, and demonstrating impact. If it's something that organisations undertake reluctantly to satisfy a funder or partner, it is always likely that involvement will be half-hearted. **The main driver for understanding the difference the service makes should be the service itself wanting to know how effective it is and how it can improve and grow.**

Embracing impact monitoring can be a major staff motivator. By approaching clients at an early stage and presenting it as something you would like them to contribute to, to see how things have changed for them and to understand how the service can be improved, ASA experience suggests clients will engage with the process.

The flip-chart notes from the individual workshop groups are attached at Appendix Two.

Payment by Results – an advice case study

Maria McNicholl, St Giles Trust Prison Project

Maria introduced the work of St Giles Trust's Peer Advice Project, which recruits serving prisoners to train as peer advice workers, gaining an NVQ Level 3 in Advice and Guidance – a meaningful qualification that will be of practical benefit to them on release. The peer advisers help fellow prisoners deal with practical issues such as benefits or housing, both during their sentence and, crucially, through the *Through the Gate* project, on release.

Re-offending rates for prisoners on short sentences are typically very high, as on release, without appropriate support, problems with benefits and housing often draw people back to crime. However, by offering trusted support, delivered by people who have experienced the revolving door of crime and short-term sentencing, St Giles Trust has significantly reduced re-offending rates, and has rolled the project out to a number of prisons.

In 2008, St Giles Trust commissioned Frontier Economics to conduct an independent evaluation of *Through the Gates*, to assess both the quality and impact of the service, but also its economic benefit. The evaluation demonstrated a return of £10 for every £1 invested in the service. With this evidence, St Giles Trust was able to build a relationship with Social Finance, a not-for-profit organisation, which aims to generate investment income to support the achievement of social goals, as well as delivering a financial return for investors.

Launched in 2010, Social Impact Bonds are running for a six-year pilot in Peterborough prison. The Social Impact Bond has raised funds from investors (in the pilot, these include BIG Lottery and charitable trusts), whose investment funds the service up-front, giving longer-term stable funding. The project partners will work with 3,000 prisoners on a sentence of less than 12 months. If conviction levels measured through the Police National Computer fall by a set amount, the saving to the Ministry of Justice triggers a return on the initial funding to the investors. It is the investors rather than the project providers who carry the risk. The experience of the providers is that they are not chasing targets, but have the opportunity to work flexibly and creatively to deliver the results for service-users.

Afternoon workshops – 1

Making payment by results work?

What elements of your service might work on a payment by results model?

The workshops identified elements of advice provision that might best fit with a payment by results approach. In the main, these were the preventative aspects of the services, which could demonstrate savings against quantifiable costs. These included:

- Tenancies sustained /eviction avoided
- Reduction in homelessness presentations
- Health impacts, eg reduction in demand for clinician time or prescribing budgets (such as anti-depressants)
- Reduction in student drop-out rates (student welfare / advice services)
- Reduction in Council Tax and rent arrears levels.

How might payment by results influence your organisational planning?

Organisations would need to be absolutely clear about their purpose and what their services achieve, and would need to be strategic and systematic in measuring, monitoring and demonstrating their results, ensuring monitoring and evaluation is an integral part of service delivery.

If funding follows outcomes, whether through up-front mechanisms such as Social Impact Bonds, or through payment in arrears on results delivered, advice organisations need to be thinking through systematically which other agencies they should be working with in order to achieve the desired outcome. It will also be necessary for partner organisations to understand the delivery chains involved in producing successful outcomes and how this is all brought together. The ability of prospective partners to evidence impact will be crucial to consortium-building and organisations will need to have robust due diligence arrangements and consortium agreements, to ensure that all partners deliver as agreed.

Social Impact Bonds are designed to ensure providers receive payment up front, on a long-term basis, with the risk being carried by the bond investors, rather than the provider. However, in the event of payment by results models, the implications on cashflow need to be carefully assessed and provision made to fund the service in some way.

How can we influence funders' thinking about payment by results?

Key to this is building relationships with existing and potential funders / investors, and ensuring that evidence is available to demonstrate the impact of the service. Organisations should identify what existing evidence exists and scope research from other sectors, eg using health prevention models.

These new models of funding will also require us to change our own thinking and presentation. How do we present our work to be attractive to investors rather than traditional funders or commissioners, demonstrating the potential financial return as well as the social benefits?

What is our organisation's unique selling proposition and who else do we need to be working with to influence thinking and deliver outcomes? For example, in the Peterborough Prison pilot, St Giles Trust works with partners from other sectors who can deliver elements of the longer-term support.

Do we truly understand the outcomes that result from the work that we do, and how they could fit with other types of provision?

Afternoon workshops – 2

What role should Advice Alliance East Midlands play?

Summary

There was a consensus that AAEM could support the sector in the region to get to grips with the new agenda through:

- Research and co-ordinating statistics from all networks, to make the case for advice. This could include the production of a regional outcomes toolkit.
- Lobbying and awareness raising on the role and contribution of advice.
- Co-ordinating a sector response, including supporting our members to come together in consortia and accessing cross sector training on new business models and methods.

Participants also agreed that it would be useful for AAEM to hold further events – eg an annual conference to enable members of different advice networks to share ideas and practice with people they might not normally meet.

Appendix One

Delegate List

| Attendant name | Organisation | Email | Phone |
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Appendix Two

Workshop Notes

Morning Workshop Notes RED

Difference we make

Clients:

- Improve self-esteem
- Lives 'back on track'
- Prevent homelessness
- Reduce debt
- Increase benefits
- Explain rights / responsibilities – empowering
- Effect change through social policy
- Reduce stress – improve wellbeing
- Advocacy – giving clients a 'voice'
- Referrals to specialists / accessing networks

Volunteering:

- Increase skills, confidence, employability, sociability
- Sense of purpose
- Giving back to the community
- Responsibility / part of a team / commitment
- Reduces isolation

The agency:

- Cost effective resource
- Variety of expertise, cultures, life experiences, enthusiasm
- Fresh eyes to challenge
- 'good will' they bring
- Raises profile of agency
- Opens up opportunities

Impact we are making

- The community – involvement
- Local economy
- Benefits for LAs and other agencies / organisations
- Preventative work – health / GPs, etc
- Quality of advice / practical solutions

Funders:

- LAs – look good / meeting targets (KPIs) / local plans
 - cost saving
- Project funding – looking good / meeting objectives
- Lottery – outcomes / promote and look good
- Central government – local targets feed into this (area perception)
 - Social policy input / campaigning for change
- MPs benefit – signposting / PR

Challenges / Barriers

- Cuts / reduction in services (support / specialist)
- Overwhelming broader issues – deprivation
- 'revolving door' issue

How measure impact

- Hard – money raised
- Soft – how feel after advice
- Case studies – ‘real’ stories / people
- Questionnaires / focus groups
- Statistics
- End of project reports (gaps, effect change, future funding)
- Depth

Challenges of measuring outcomes

- Staff time – resources to collect / analyse – use students?
- Timing – delay to realise benefits (follow up)
- Cannot leave it too late to effect change
- Cost of volunteering
- Getting questionnaire input and ‘sticking’ with it
- How to use data
- Assess impact of all services
- Client resistance
- True representation? Not always a good outcome

How overcame challenges

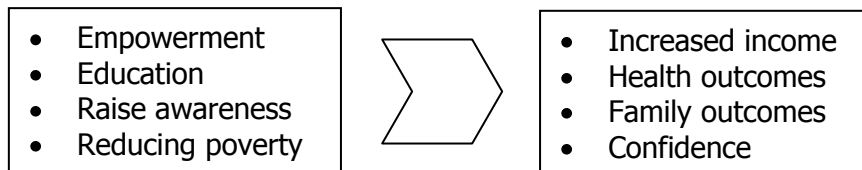
- Examples on ASA website
- Volunteers / students to conduct research (right skills and training)
- Learning form other agencies (sharing best practice)
- Explaining to clients why we’re doing this (be clear yourself)
- Incentivise
- Communicate outcomes
- Volunteering journey – longer-term issue

Morning Workshop Notes BLUE

Who are the beneficiaries?

- Clients and their families
- Other advice providers
- Communities
- Funders
- Elected representatives
- (SROI) public purse
- Central government
- Private sector – ie British Gas example
 - eg workforce
- Those the client is in dispute with

What difference do you make?



- Reduction in time taken to resolve issue
- Save money from public purse in long term
- Changing lives through improved life chances
- Reduction in crime and re-offending
- Secure people's rights
- Help to get people into work via volunteering
- Stable communities and society
- Policy change via campaigning
- Provide a voice for our clients

How do you record and measure your impact?

- Quantitative data – database
- CAB – client satisfaction surveys, client comments – soft outcomes?
- Age UK – volunteer collects all survey results
- Refugee Action: funders' statistics – staff carry out surveys
- Shelter – case management systems, QAF stats, etc

What are the challenges / barriers?

- Resources – time, staff, costs
- Pace of change
- Disparity of outcomes required by funders
- Funders' lack of understanding of sector
- Perceptions and attitudes towards monitoring and evaluation
- Lack of tools, training evaluation and guidance
- Lack of universal vocabulary

Morning Workshop Notes GREEN

Who benefits?

- Clients
- Clients' family
- Local community / economy
- Advisers
- NHS
- Council
- Courts
- DWP
- Advice agencies
- Funders

Clients

- Left them in stronger position
- Financial circumstance
- Relieves stress
- Keeping their home
- Improve confidence
- Choice

Methodology developed by David Rock looks at 'soft outcomes':

Status
Confidence
Autonomy
Relatedness
Fairness

| | Removing suffering | Increasing wellbeing |
|------------------|------------------------------|---|
| Mental | Stress Anger Anxiety | <ul style="list-style-type: none"> • Choice • Independence • Informed • Feel respected / listened to • Contribute to community |
| Emotional | Conflict Family tension | |
| Physical | Health | |

As an example ...

| Health | |
|-------------------------------------|---|
| LA (Public Health) | GP (Acute) |
| Income maximisation (H) | Find out criteria GPs are going to use to judge funding (A) |
| Independence (S) | |
| Mental – reducing stat service need | |
| Choice – informed and acted | |

Has the quality of...

Following your advice do you feel more able to act on life choices:

- Financially?
- Food / Diet?
- Mobility?

Difference in funding means x people aren't seen because of monitoring

Morning Workshop Notes ORANGE

Demonstrating our value

Difference from your organisation:

- Improved economy in the area
- Enable people to remain in employment
 - Effect on family life
- Remaining independent in own homes and generally
- Improvement to mental health
- Confidence / empowerment
- Removes fear factor eg of removing children into care, benefit fraud accusations
- Advice help to marginalised groups
- Quality of advice – specialists
- Support most vulnerable in society
- Provide volunteering opportunities – ways into employment, training, etc
- Recognise safeguarding issues
- Provide critical friend, strategic discussion, campaign / influence

Who benefits?

- Our clients
- Communities and business
- Funders
- Health service – better health and wellbeing
- Costs less to the public purse
- Volunteers – feel valued and extra skills
- Economy / society (avoids issues)
- Local authorities, councils, MPs
- Families, carers, friends
- Social control of wider population

Recording and measuring your impact

- Numbers of clients
- Financial gains
- Satisfaction surveys – ask if they will complete more than once
- Letters of thanks
- Use other methods of surveying people ie online – Survey Monkey
- Random sample – phone them up
- Qualitative interview over the phone – ie story-telling of what happened next
- Research / reports with “in-depth” anecdotal quotes
- Capture what they spend extra resources on
- Ask if the advice intervention has helped them to challenge and live independently
- **Health Warning** - Social Return on Investment is **very** difficult to quantify in terms of money

Challenges and barriers

- Sometimes our own client base – ie vulnerable, inarticulate, don't act on advice
- Time and aversion to monitoring (ie being put into boxes!)
- Resources in general
- Funding
- Expectations – what life owes them
- Skills, training and technology
- Keeping up with changes nationally and locally – ie benefits, adult care, policy and strategies
- Demonstrating what “advice” is – to public, funders and government
- Sharing information – data protection?

How to overcome

- We need the information for future funding / development of services
- Educating and influencing the public and funders
- Good quality feedback to strategies, policy and funders
- Working together to avoid duplication
- More funding to the sector!

Afternoon Workshop Notes RED

What element of your advice service might work on a payment by results model?

- Housing duty scheme – tenancies sustained?
- GP visits
- Anti depressants prescribed } CF measures
- Homelessness reduced (applications to LA)
- Some areas – eg moving into employment – are only part of the work
- Reduction in Council Tax arrears levels
- **No agreed model that advice fits into**
- Could benefits advice fit into the personalisation model?
- Volunteering
- Sell expertise to new markets

How might payment by results influence your organisational planning?

- Be clear about what you set out to do
- Set systems up at the outset
- Good invoicing procedures will lead to good cashflow
- Good administration
- Regular monitoring
- Safeguards against cherry-picking
- Some of new agenda thinking is subjective – eg Happiness Index. Advice sector could use this
- If there is deferred payment there is a need to be able to fund the activity initially
- Need to influence social investment decision makers

How can we influence funders' thinking about payment by results?

- Who are they and how do we raise awareness? (investors and social investment fund)
- Health providers – use existing research models, etc
- Find out what makes entrepreneurs tick
- Identify incentive for funders
- Raise our profile about what we do
- Help shape the measures
- Use the media

Afternoon Workshop Notes GREEN

There are a number of payment by results methods already in use.

- Financial Inclusion Fund – paid in advance with claw back
 - Paid by full-time equivalent
 - Generous overheads
- Legal Services Commission – unit cost monthly payment with claw back
 - Paid on closure of case, which could take a while.
 - Standard quality
- Community care – paid fixed fee on closure – unit cost

Issues that arose?

Issue is about payment by outcome, not necessarily by results. Results can be outputs, simple service delivery etc. Outcomes pose a series of issues for advice provision as highlighted below.

Long-term nature of achievement of outcomes against cashflow needs

Sanctions and conditionality that is almost needed to protect your interventions

Confidentiality

Advice is not a support agency – not long-term support

Cashflow issue

Volunteering

Cherry picking. The payment process has to be smart.

Afternoon Workshop Notes ORANGE

What element of your advice service might work on a payment by results model?

- Prevention services – ie smoking cessation, homelessness
- Potential student “drop-out” rate
- Quality advice and success with claims enables local authority to gain more from government funding via formulas used
- Giving a quality role model
- Offer extended service of an annual benefit check to avoid issues

How might payment by results influence your organisational planning?

- Rationalising service delivery
- Financially organisations would need to include the payment by results element within the tendering process
- Robust “systems” to collect data – outcomes, etc both now and in the future. “A crystal ball”!
- Need different staffing levels and specialists
- Led by funders’ requirements and their outcomes

How can we influence funders’ thinking about payment by results?

- Need to evidence direct correlation between your service and how it “helps” society, clients and Social Return on Investment
- Forming relationships and working strategically with funders
- Collaboration with other organisations

- Previous success stories “to steal”
- Getting funders to come to the service and see first-hand what happens
- Peer shadowing
- Portfolio holders for your field of work
- Accountability – who is?
- Government’s setting the example to invest in social capital and volunteering!!
- Independence and unique selling point of each individual organisation
- Give them reasons to resist the “sausage mentality” – clients value specialisms

Advice Alliance East Midlands Planning

How could the Alliance add value? What are the top priorities?

- Inform and influence changes in agendas and disseminating the information to support business development
 - Support learning across the sector to enable business continuity – eg tender writing
 - Marketing and media influence – co-ordinated continuation of the current awareness raising of advice services
 - Connect with industry / technology firms’ corporate social responsibility departments. Connect with universities – psychology, business school, PHD students
-
- Sharing information
 - Develop an outcomes toolkit based on the ASA model, so we all have a standard approach
 - Co-ordinating responses / challenges
 - SROI exercise
 - Annual conferences
-
- Research – pull together all our statistics
 - Sounding board to help develop consortia bids
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- Embrace payment by results and how to work differently
 - Promoting the diversity of the sector and acknowledging that this is a massive strength
 - Quality, training and support for each other so that we can support / advise / empower our clients
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- How can the Alliance add value?
 - Strength in numbers
 - Expertise issues
 - Support
 - Networking
 - Collaborative working
 - Motivational – sense that “you are not alone”
 - Themed meetings