

WORKING WITH BENEFICIARIES

Help through Crisis learning paper
February 2020

Delivered by



About the Help through Crisis programme

Help through Crisis (HtC) is a £33 million National Lottery funded programme set up by The National Lottery Community Fund, the largest funder of community activity in the UK. HtC supports 69 partnerships across England which help people who are experiencing or at risk of hardship crisis to overcome the difficulties they are facing to plan for their futures. The partnerships receiving National Lottery funding through the HtC programme bring together local small voluntary groups and established charities. Working together, they offer people advice, advocacy and support which matches their personal circumstances. The aim is to look at the issues people face, and the underlying causes, from their basic needs, to their physical and mental health, to skills and employment. People are supported to draw on their personal experiences to build on their skills and strengths so they are ready to seize the opportunities and challenges ahead.

About the Learning, Support and Evaluation team

The HtC, Learning, Support and Evaluation (LSE) team is a consortium of organisations commissioned by National Lottery Community Fund to help build understanding and capture learning from the Help through Crisis programme. The team is made up of people from Ipsos MORI (Lead Contractor), NEF Consulting, Revolving Doors Agency and Hopkins Van Mil. The role of the consortium is to help the 69 partnerships involved in the programme:

- Empowering them to evaluate and measure their impact, and capture learning about what works in tackling hardship crisis.
- Supporting their co-production activities, ensuring the people they support have a voice in shaping local services.
- Identifying good practice and disseminating learning to build the evidence base and help partnerships to replicate or scale up approaches from elsewhere.

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Ipsos MORI

NEF
CONSULTING



Creating Connections
Hopkins Van Mil

INTRODUCTION

Working with beneficiaries is an important focus for the Help through Crisis (HtC) programme. Partnerships are at different stages in terms of how they involve beneficiaries. Some are gathering feedback and engaging with people to inform their services. Others are moving beyond this towards designing, improving and influencing services with people.

Many partnerships have already taken time to reflect on current ways of working and learn from what others are doing, both within the HtC programme and in crisis support more broadly. We also know there is lots of interest in finding out more about different approaches, particularly for practical tips and relevant examples of working with beneficiaries.

We wanted to celebrate the progress that has been made so far in the programme and help partnerships to do more as HtC continues. This learning paper therefore explores how partnerships are working with beneficiaries. This includes:

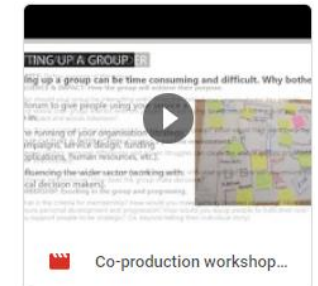
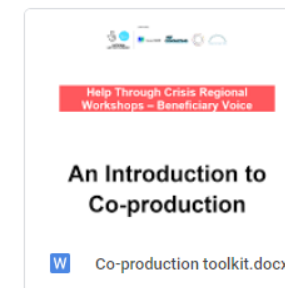
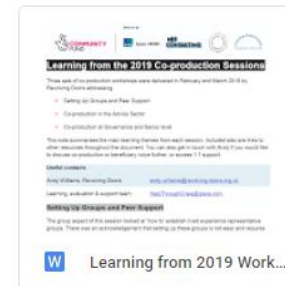
- 1 How HtC projects are engaging and involving beneficiaries in different ways**
- 2 Examples of how HtC projects are setting up user groups**
- 3 What is co-production?**
- 4 Examples where feedback and engagement has shaped HtC services or had a wider influence locally or nationally**

This paper brings together case studies from HtC partnerships. It has been designed to encourage partnerships to think about their existing approaches, and identify ways of doing things differently. There are reflection questions at the end of each section to work through.

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Check out Andy's beneficiary voice and co-production materials on the [Help through Crisis Google Drive!](#)



THE LADDER OF ENGAGEMENT

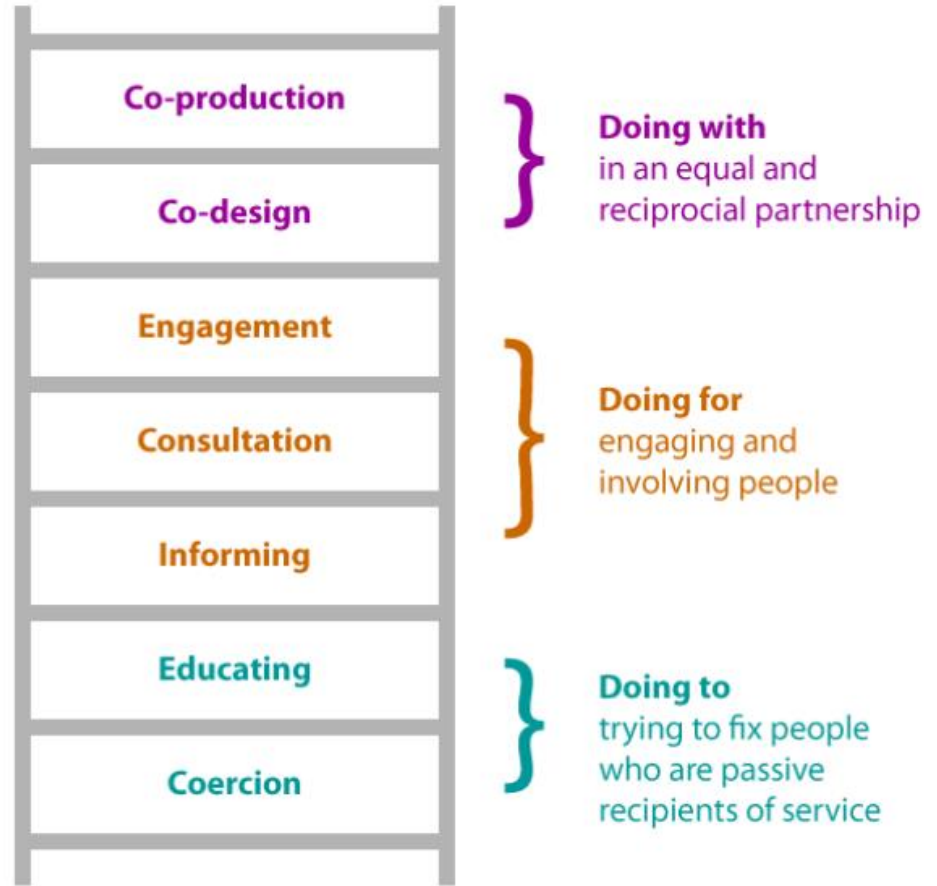
The ladder of engagement is a useful way of making important distinctions between co-production and other forms of engagement and consultation. This learning paper explores many of the different ways HtC projects are working with beneficiaries at different 'rungs' of the ladder.

It is not a ladder that you have to start from the bottom and work upwards with. Instead, projects can start co-producing services or engaging with beneficiaries without ever doing the lower rungs.

At the start of each section, we have highlighted which areas of the ladder the examples relate to. We hope this will help to distinguish between the different ways organisations are working with beneficiaries both within and outside of the HtC programme.

Not all HtC partnerships are co-producing their services with beneficiaries. But we wanted to share some examples of how projects have been working with beneficiaries, and what they are hoping to do in the future.

There are lots of existing resources available on working with beneficiaries. Andy from Revolving Doors Agency has led several workshops and produced materials exploring co-production. These are all available on Slack and [Google Drive](#). This includes the [introduction to co-production guide](#) and the [co-production strategy template](#).



Think Local Act Personal's Ladder of Engagement from their [co-production guide](#).

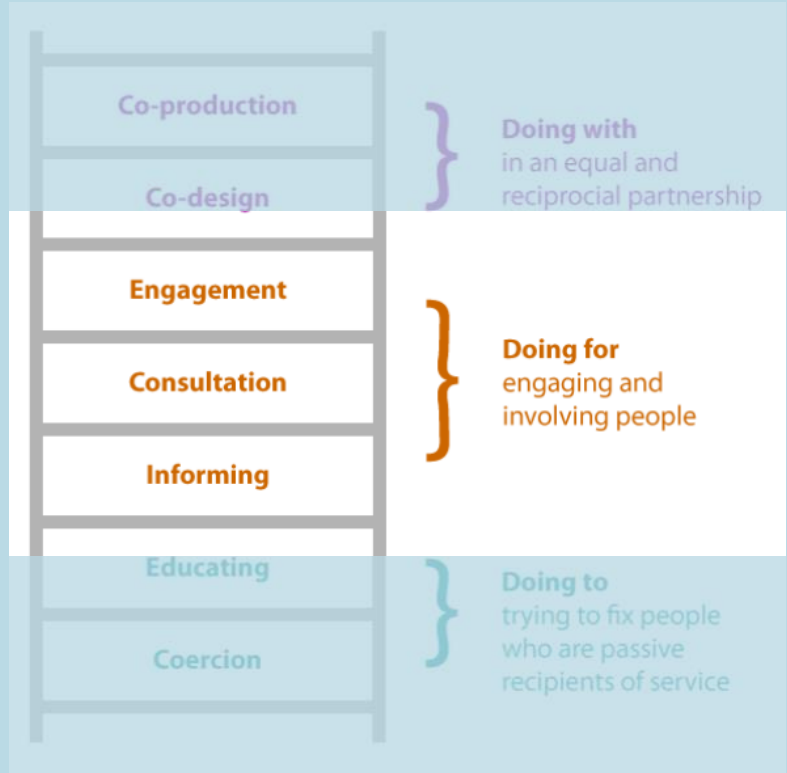
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1

ENGAGING AND INVOLVING PEOPLE

To gather feedback and share experiences

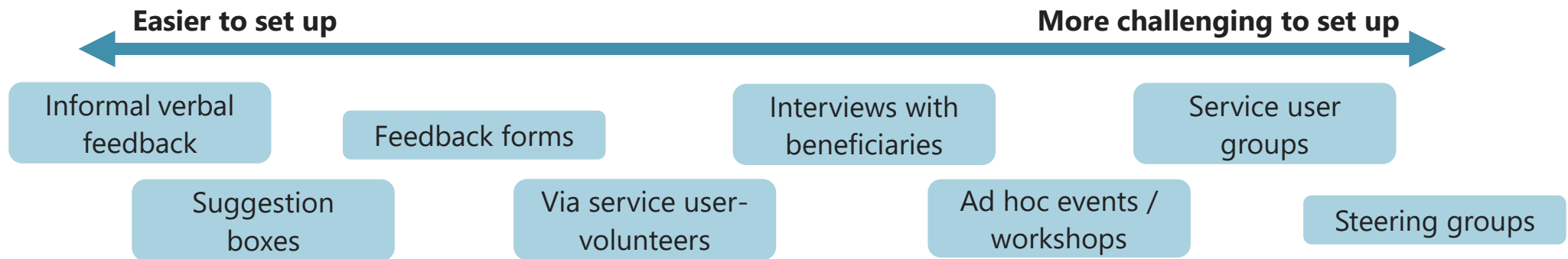


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PARTNERSHIPS GATHER FEEDBACK IN A RANGE OF WAYS

Partnerships across the HtC programme are gathering feedback from beneficiaries in a range of ways. Doing this meaningfully is an important stage in building relationships and changing how an organisation thinks about delivering services. Different approaches affect the type and depth of comments gathered, and involve different resource commitments.



Partnerships suggest the following are important to gathering feedback:

- Taking a **flexible approach**. Gathering feedback in a number of formal and informal ways may help beneficiaries to feel comfortable sharing their thoughts. This ensures that **different voices are heard** (not just the highly engaged).
- **Informal options** might include staff members noting verbal feedback provided by people using services. **Working with volunteers** to gather feedback can be another effective way of doing this.
- **Incentivising** feedback sessions financially or in other ways has also worked for some partnerships – to encourage involvement from those less likely to engage.
- Asking for small amounts of **specific feedback about aspects of a service** may encourage those who tend to disengage when asked for overall feedback. Breaking down feedback in this way also means beneficiaries can have an ongoing conversation with you about their experience.
- **Making the case for feedback** to beneficiaries, and including this as part of the beneficiary journey (when appropriate). For example, explaining how this can help a project improve and support others accessing support in the future.
- **Making feedback high profile**, such as visualising feedback through posters or sharing what you have done as a result.

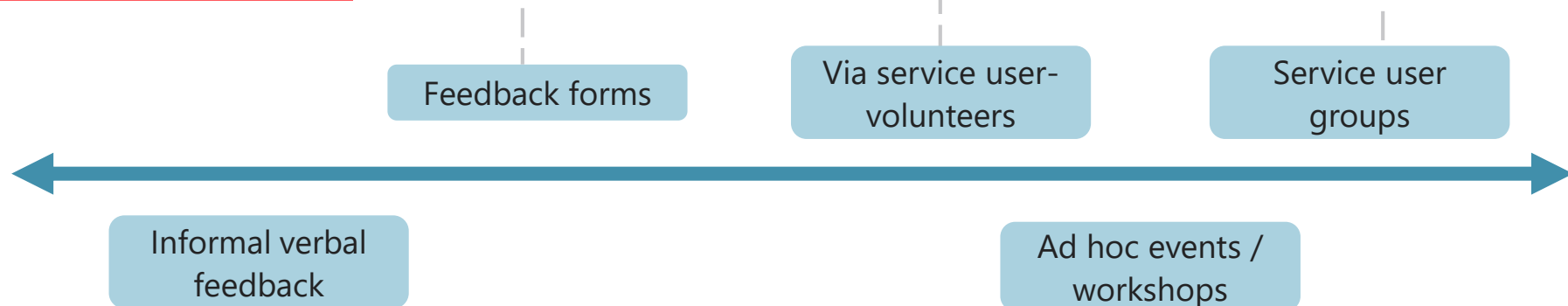
GATHERING FEEDBACK INFORMALLY AND THROUGH EVENTS

It might not be a volunteer doing advice work, but you're volunteering to the organisation in a different capacity. They might help with fundraising events. **If a young person wants to engage, we'll find any way possible to enable them to do it.**

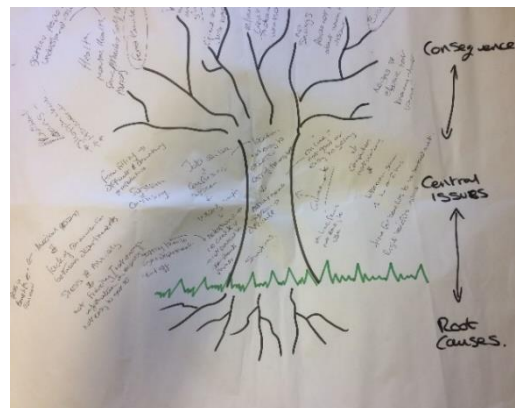
The **Bond Board** provided peer research training to their volunteers with lived experience. They were invited to gather stories of how current clients use their assets through **5-7 minute "micro conversations."** This short format supported the peer researchers to feel comfortable and aid in remembering the questions. It was also easier for interviewees who found longer conversations more challenging.

The [survey design note](#) includes suggestions for designing questionnaires or feedback forms for HtC projects.

These will be considered further in the **next section**.



Some partnerships ask for **verbal feedback at a number of key points** during a beneficiary's involvement with a service. This can be as simple as finding out how they found something, with suggestions for how it might be improved. Ideally, this feedback should be captured so it can be collated, analysed and acted on.



The Crisis Tree is an approach used by **Rossendale Citizens Advice** in **focus groups** with beneficiaries. The roots are used to discuss the root causes of crisis, the tree trunk is to discuss what the core issues are for individuals and the leaves are used to discuss the consequences of crisis.

VIDEOS & CASE STUDIES CAN EFFECTIVELY CAPTURE VIEWS



Some partnerships have used **audio or video** as a way of capturing feedback from beneficiaries. The videos can be shared at events or online (with appropriate informed consent). They can be a great way of sharing the views of beneficiaries and making a powerful impression on staff and wider stakeholders.

This is an approach **Stockton Citizens Advice** used at their annual HtC event. They developed a film capturing the views of several beneficiaries and the project lead as a way of sharing the impact of the project. At a previous event, beneficiaries had decided they did not want to speak in front of so many people. The video gave them a way to share their thoughts without having to attend the event in person.

A number of examples of videos and audio files have been shared on Slack including:

- Eddie's story from [Citizens Advice Hull & East Riding](#)
- Genny's story from [Ealing CVS](#)
- Gillian's story from [Citizens Advice Hull & East Riding](#)

Citizens Advice North West Kent had limited experience of working more formally with beneficiaries before HtC. Like many partnerships, they are considering the best ways to improve how they do this. They have found it difficult to gather feedback because partner organisations are spread over a large area, making it hard to bring people together. They also tend to support beneficiaries in a one-to-one setting, which has made it challenging to maintain contact after an initial crisis.

To take this forward, they are now considering:

- Collecting **more case studies and client journeys** from across partners to form a body of evidence which can be analysed alongside other impact data. This will help to identify themes and trends to share with decision-makers at the end of the project.
- Producing a **short video** where clients and caseworkers share their stories. This can be shared on social media and used at events.
- Identifying **Community Champions linked to partner organisations** who have lived experience of crisis and can be the voice of the people they work with.

They are aiming to use the experiences of beneficiaries who have faced actual or threatened homelessness to shape their bid for future funding. They also want to capture learning to influence policy and decision makers locally.

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WHAT ACTIONS ARE YOU GOING TO TAKE?

Q Reviewing how you gather feedback

- **What feedback do you currently gather from beneficiaries?**
 - What's the purpose of the feedback?
 - Are there aspects of your service where you would like more feedback?
 - Are there any groups of beneficiaries you aren't gathering feedback from?
- **How do you use the feedback from beneficiaries?**
 - Which rung on the ladder of engagement does it relate to?
 - What has changed as a result of feedback from beneficiaries?

Q Improving engagement through feedback

To improve how you gather feedback:

- What formal and informal ways of capturing feedback can you introduce?
- How can you capture the experiences of beneficiaries you don't currently gather feedback from?

To improve what you do with feedback:

- What simple things can you do in response to the feedback you've already had from beneficiaries?
- How can you share feedback and experiences from beneficiaries more widely, beyond the partnership?

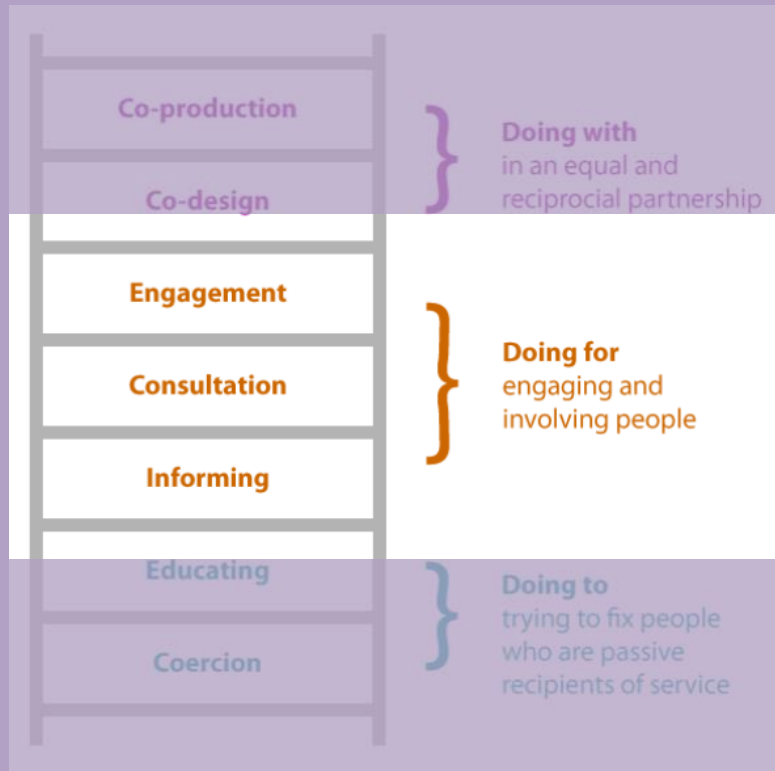
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2

INVOLVING PEOPLE THROUGH USER GROUPS

To shape services and have an influence



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WHAT IS A USER EXPERIENCE GROUP?

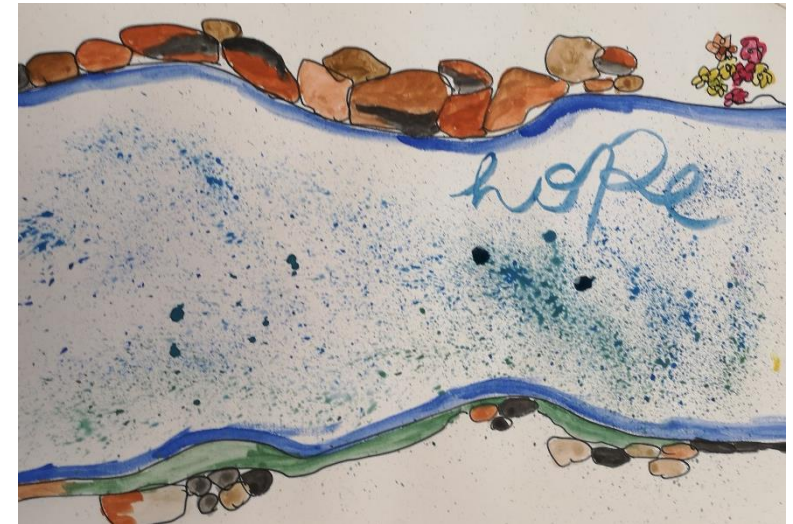
Setting up a user experience group is one of the ways HtC partnerships involve beneficiaries. This is a more time intensive and formal approach to gathering feedback, but has the potential to engage people over the longer term and in more meaningful ways.

These groups will have different purposes: from improving a service to having an influence on local or national decision-makers. This is a good way to move from gathering feedback to working with beneficiaries, and towards co-producing how services are run. The [guide to developing peer support and groups](#) includes the key steps involved in setting up a group.

Bevan Healthcare captures feedback from beneficiaries through their user experience group alongside noting informal comments from beneficiaries. This helps them to hear from a range of people involved in the service – both those who have more of a formal feedback role and those that want to share their experiences in other ways.

Bevan's user experience group, Experts by Experience, aims to gather feedback about the project. The group was set up as part of the GP surgery's Patient Participation Group, and has been extended to include the wellbeing centre. The group gives the wellbeing centre access to patients who have used services, and this group enables Bevan's wellbeing centre to collect valuable insights.

The processes for collecting feedback help to shape decisions. The project lead told us that often beneficiaries want to do more activities more frequently, but finding the budget to run these can be a challenge. In response, Bevan has changed the timetables of activities, such as changing the timing of the women's group to avoid school pick up times, and set up activities to suit different needs, such as the men's café and the women's craft group.



Artwork designed by one of the people involved in Bevan's HtC project.

GROUPS TAKE TIME TO ESTABLISH

Cambridge Citizens Advice has set up a service user group to capture the experiences of the people using the service which feeds into the Cambridge Citizens Advice management board.

The **Cambridge Citizens Advice** user group meets twice a year, with around three or four service users attending each meeting. Although the group is small, the project hopes to expand the membership over time.

The group was established after the project lead attended some of the HtC co-production workshops. They had not thought about involving beneficiaries in this way before, but questioned why this was the case after attending the workshop. The project lead spoke to the Chief Executive of the organisation and they agreed to set up a user experience group. Normally the project lead designs the agenda for each meeting, and the group agree when they next want to meet at the end of every session.

In a recent session the group was asked to look at several websites and come with ideas for how the Cambridge Citizens Advice website could be improved. Suggestions included making sure the website meets readability guidelines for those who are partially sighted or have dyslexia. The project is also making changes to their registration form as a result of the group, moving the question about why someone is attending the service from the back to the front of the form. This helps to recognise the reasons why someone is coming to Citizens Advice straight away. The group felt it would reassure people that the service will address their problems and stop people from being put off by answering all the background information on the form.

The Chief Executive of the organisation normally attends these meetings to hear the views of the group and give an update on the organisation's plans. The project lead explained the importance of introducing the idea of joining the group to beneficiaries at the right time, when they are ready to get more involved.



Go for it! It is slow, it is a slow burn. Don't be put off. We are still very early days but I am really pleased with the small number of service users who have engaged with us already."

GROUPS CAN WORK TOWARDS HAVING AN INFLUENCE

The Oxford Influencers Group brings together people who have accessed services through Citizens Advice Oxford. The group aims to influence both Citizens Advice Oxford and wider policies and services. Rachel's role as a Participation Worker focuses on empowering people to have an influence in policies and services that affect their lives. This role was established to help the organisation bring more lived experience into their work, something that Citizens Advice does not have a history of doing.

The Oxford Influencers Group recruited members who had accessed Citizens Advice Oxford services and those of their partner organisations. They were recruited through meetings and events.

This year, they have focused on having a local influence. The group recently attended the Oxford City Council Housing scrutiny panel, the body that scrutinises and makes recommendations on all council policy relating to housing/homelessness.

One of the group members delivered a speech to the councillors in the formal meeting using a microphone. While the group member was nervous, the support of the rest of the group helped to provide encouragement.

The councillors are interested in working together and hearing the views of housing association tenants, private sector tenants and those in receipt of homelessness support services in the future. They hope this will help to bring lived experience to the council's decision making processes in areas such as housing and mental health.

This is a great example of how user groups can have an external influence on local policy makers. If you are interested in finding out more about the Oxford Influencers Group, you can see [some case study slides here](#).



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WHAT ACTIONS ARE YOU GOING TO TAKE?

The [guide to developing peer support and user groups](#) described four key areas to consider when setting up a group as well as further questions to reflect on. This can help structure an approach to setting up a group.

Clarity: define the purpose of a group

Influence & impact: how the group will achieve their purpose

Group culture and interaction: creating a positive environment

Membership: excelling in the group and progressing

Q Setting up a group

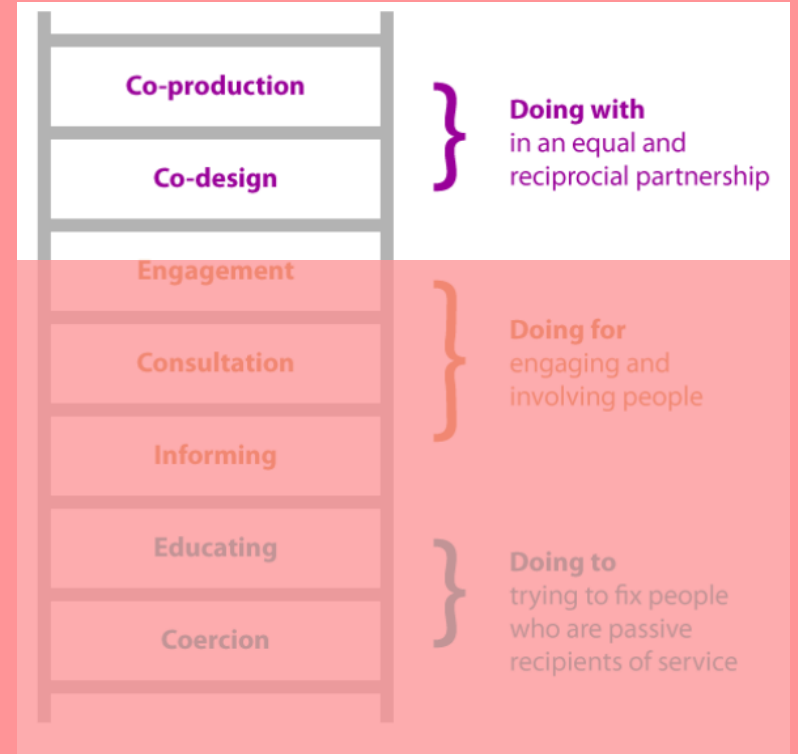
- **What is the purpose of the group?**
 - How will you agree this with members?
 - How can you ensure the purpose is clear and realistic?
- **Who should the group be interacting with?**
 - Who are the key people (within or outside of an organisation) that can help to influence change?
 - How could your group engage with these people?
- **What is the criteria for membership?**
 - How will the group be diverse and inclusive?
 - How can members be supported in their role?

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3

WHAT IS CO-PRODUCTION?



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CO-PRODUCTION INVOLVES SHARING POWER

Co-production involves **changing the way services are delivered, upending the power relationships embedded in a service**. This takes time and effort.

Key principles include:

- **Recognising people as assets:** People are seen as equal partners in designing and delivering services, rather than as passive beneficiaries or burdens on 'the system'.
- **Building on people's capabilities:** Everyone recognises that each person has abilities and people are supported to develop these. People are supported to use what they are able to do to benefit their community, themselves and other people.
- **Developing reciprocal relationships:** All co-production involves mutuality, both between individuals, volunteers and professionals – and between the individuals who are involved.
- **Encouraging peer support networks:** Peer and personal networks are often not valued enough and not supported. Co-production builds these networks alongside support from professionals.
- **Blurring boundaries between delivering and receiving services:** The usual line between those people who design and deliver services and those who use them is blurred with more people involved in delivering projects.
- **Facilitating not delivering to:** organisations enabling people to take action themselves, rather than providing services. An example of this is when a council supports people who use services to develop a peer support network.

Co-production has a different power dynamic. It aims to empower beneficiaries."

Involvement can be light touch, a bolt on, surveys and window dressing. Co-production means the service is designed and delivered together."

Initially co-production can be more labour intense, but long term it brings more benefits and makes things more efficient. Essentially it's about culture change."

These quotes come from [the 2018 co-production workshops report](#).

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CO-PRODUCTION CAN HAPPEN IN DIFFERENT WAYS

The Fund has also developed [resources exploring co-production](#), setting out their learning from their strategic programmes. They describe how co-production in these programmes can be grouped into five broad areas:

Decision-making:

Governance: making decisions about how the project runs as part of a formal governance process.

Co-commissioning: commissioning / procuring a delivery contract or making funding decisions.

Co-design:

Influencing what a project or service should look and feel like.

Co-research:

People with lived experience undertaking research and evaluation.

Co-delivering:

People with lived experience doing things, delivering activities in a voluntary or paid capacity.

Voice:

Giving people with lived experience a say or influence on wider services, issues or policy.

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HTC PROJECTS ARE MOVING TOWARDS CO-PRODUCTION

Co-production is about working with beneficiaries in an **equal and reciprocal partnership** to ensure services are shaped by their experiences and meet their needs.

This is often harder for organisations to set up and establish than more familiar forms of engagement. It requires changes to organisational strategy and completely different ways of working. As a starting point, it can be helpful to develop a co-production strategy or a set of principles to define and communicate an organisation's approach (see the [strategy framework template](#) for a starting point). We've also included some examples of HtC projects' co-production statements on the right.

As mentioned earlier, it is important to emphasise that organisations do not need to work up the ladder of engagement – moving from informing to consultation to co-design. Instead, starting with co-production, such as through a small scale pilot, can be an effective way of growing the approach. This is explored further in the [guide to co-producing governance and designing services](#).

Over the next few pages, we've included some examples of how organisations involved in the HtC programme have worked with beneficiaries beyond engagement and consultation. They have tried different approaches and have learned lessons from doing so. Some organisations have been using similar approaches for many years, while for others this is a completely new way of doing things.

We have four key principles:

1. Inclusive valuing the lived experiences of services users, customers, volunteers and staff in shaping and developing our services.
2. Listening and learning – this is a developing process.
3. Creative approaches to be inclusive and engaging as many people as possible where they are with the time that they are willing to give.
4. Not measuring and monitoring out the magic."

Recognising people as assets. Building on people's capabilities. Developing two-way, reciprocal relationships. Encouraging peer support. Blurring boundaries between delivering and receiving services. Facilitating rather than delivering."

Our clients are 'experts by experience' who have unique and specific knowledge of the challenges they face. Incorporating their views will lead to more effective design of policies and services so that they genuinely meet the needs of people who use them."

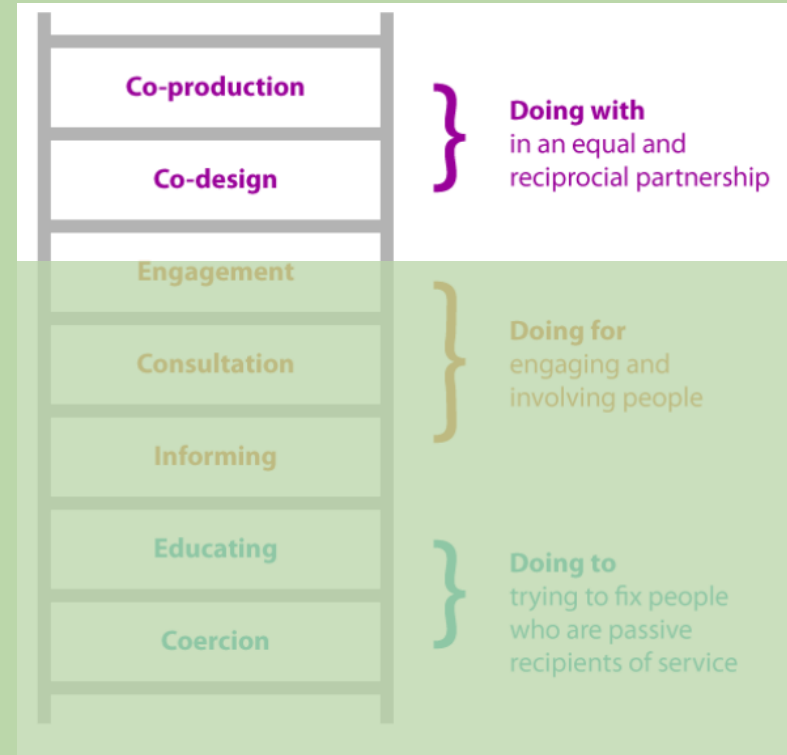
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4

DESIGNING, IMPROVING & INFLUENCING SERVICES WITH PEOPLE

Moving towards co-producing services



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SETTING THE AGENDA

This example from the Mancroft Advice Project (MAP) illustrates how beneficiaries can be involved in setting the agenda for a service. Beneficiaries hold the power to decide what they want to do, and spend funding in their own way without involvement from members of staff.

MAP provides a space for young people to choose the activities they want to do at a weekly social club.

The social club is a space for service users to get together informally. The activities are chosen by the group and have previously included training sessions, yoga, and the cinema. These are paid for by the service, with beneficiaries deciding how they would like to spend the social club budget each week.

There is no specific aim for the meetings and they are led by the young people involved rather than members of staff.

MAP has created a space for young people, giving them control and empowering them to decide what they do with these resources. Often, the people using a service may want to get together with people and engage in low-key activities that help them to build a sense of community rather than anything too complicated.

This approach has shown impacts in building wellbeing, reducing isolation and creating peer support networks.



A collage made by the young people that use MAP

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DESIGNING SERVICES

This example from Middlesbrough and Stockton Mind illustrates how their project has started to design services with beneficiaries. They are at the early stages of developing new support and have described their plans for next steps.

Middlesbrough and Stockton Mind held a workshop with beneficiaries to find out more about local needs and generate ideas for how they can develop relevant support. They learnt how:

- Some people experiencing extreme stress are unable to engage, rather than unwilling.
- Some people can be scared to access services for a variety of reasons such as losing control, not understanding the systems or processes, and worrying about who they will be working with.

Following this feedback, Middlesbrough and Stockton Mind are designing a drop in service with people with lived experience. The goal is to support people that don't or can't access more structured services.

Middlesbrough and Stockton Mind will remove some of the structure that their services have traditionally had. For example, not completing paperwork, not asking what is wrong and why people have come to a service and not having expectations that people will continue attending. The idea is to give people more control over their own support.

As they design the service, every step will remain within the principles they agreed at the workshop (listed in the table).

The project is also starting a formal lived experience group. They plan to recruit people with lived experience to run the group, with support from project staff. The aim of the group is to influence local commissioners and stakeholders.

The service will...	The service won't...
<ul style="list-style-type: none"> • Get to know the person before doing anything • Feel informal, inviting, comfortable and make people feel at ease • Empower people to make their own decisions – the person will be in control • Focus on the person not the problem • Be a drop-in that is promoted by peers and through word of mouth • Be flexible and delivered in the community – not just in one building • Tailored to do what the person wants and needs. Clients will decide when to close a case • Be positive and make people feel positive • Offer an environment where people with similar experiences can connect 	<ul style="list-style-type: none"> • Ask intrusive/ difficult questions when they first meet a person and never ask these types of questions before trust has been built • Ask 'why are you here?' • Be appointment only/ inflexible • Be restrictive • Follow a script or be guided by paperwork

SHAPING A STRATEGY

This example is from a HtC partner organisation, People Matter IW. It describes how they have co-produced an adult learning disability strategy for the Isle of Wight.

People Matter IW is a HtC partner project of Citizens Advice Isle of Wight. It is a user-led organisation working with anyone who defines themselves as having support needs, and their carers. This can include people with learning disabilities, people with physical disabilities, people with mental health issues, and parents of children with disabilities.

People Matter IW hold a number of groups every six weeks for people with a range of support needs. For example, there are groups for older people, for those with learning disabilities, and those with addiction issues.

Senior stakeholders on the Isle of Wight are invited to attend the groups where relevant. This has previously included the Head of Adult Social Care and senior stakeholders from the Department of Health.

There are around 30 people in the group for adults with learning disabilities, and this group was instrumental in creating the [Adult Learning Disability Strategy](#). People Matter IW worked alongside the Isle of Wight Council (IWC), Isle of Wight NHS Trust, and Isle of Wight Clinical Commissioning Group (CCG) to create the strategy across a two and a half year period. This amount of time was needed to fully work with the service user groups and ensure feedback was built into the strategy at each stage of its design.

As a result, the minutes from the meetings about the strategy were drafted in an easy to read format. An easy to read version of the finalised strategy is also available. This helps everyone to “*understand and participate fully*” as well as see how the group has influenced the approach.



The strategy took 2.5 years to create because it was done wholly with the service users.”

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DELIVERING SERVICES TOGETHER

This example from the Matthew Tree project illustrates how they have involved beneficiaries throughout their organisation. They have continued to work with beneficiaries through the HtC programme, building on an ethos that has been central to the way their organisation has developed over many years.

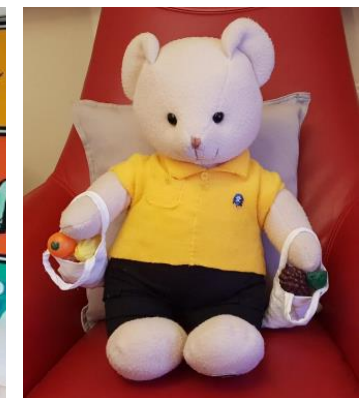
The **Matthew Tree Project** described what co-production means to their project:

“People with lived experience (clients and ex-clients; some staff, and some volunteers) work alongside everyone else to shape every aspect of the programme. This brings a wealth and diversity of empathy and experience to our planning, practical development and external communications.”

The project enables people to make decisions about the support they receive as well as shaping the Rebuilding Lives project. For example:

- Clients using services co-facilitate service delivery sessions
- Clients providing feedback to shape services in formal and informal ways, including through regular reflection interviews and during drop-in sessions
- Clients speaking at events, writing case studies and sharing experiences with each other
- Giving the delivery team autonomy to ‘do whatever is required’ for each client case and allowing clients close their own case

More information can be found in the 2019 national event summary, and the [Matthew Tree Project's presentation](#). The images on the right are from the Matthew Tree Project including one of their food growing sites where clients, volunteers and staff work together each week.



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WHAT ACTIONS ARE YOU GOING TO TAKE?

Q Developing a strategy

- **Do you have a co-production strategy?**
 - How well is it working?
- **Do you have an agreed statement or set of principles defining your approach to co-production?**
 - How were these agreed?
- **How could you work with beneficiaries to change the local system?**
 - How could they shape the approach?
 - What support might you need?

Q Moving towards co-production

- **Who is making decisions in your organisation?**
 - Where does power lie? E.g. are staff, volunteers or beneficiaries in control?
 - Who might need to give up power or control for you to co-produce services?
- **How can you involve beneficiaries in shaping services?**
 - How can beneficiaries set the agenda?
 - What would happen if they started with a blank sheet of paper?

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THANK YOU!

We'd like to thank all the partnerships who have contributed examples to this paper:

Bevan Healthcare

Citizens Advice North West Kent

Mancroft Advice Project (MAP)

No Limits Southampton

Middlesbrough and Stockton Mind

Fiscus North

Avon and Bristol Law Centre (ABLC)

Ealing CVS

Cambridge & District Citizens Advice

The Matthew Tree Project

Oxford Citizens Advice

Rossendale Citizens Advice

The Bond Board

Citizens Advice Oxford

People Matter Isle of Wight

Stockton Citizens Advice

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If you have any comments or questions about any of the issues discussed in this paper, please get in touch with the Learning, Support and Evaluation team using the email address below, or via the Slack platform.



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