

INVOLVING BENEFICIARIES: LEARNING FROM HELP THROUGH CRISIS

Learning paper

June 2021

Delivered by



Ipsos MORI



Creating Connections
Hopkins Van Mil

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 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 The National Lottery Community Fund to help build understanding and capture learning from the HtC programme. The team is made up of people from Ipsos MORI (Lead Contractor), Revolving Doors Agency and Hopkins Van Mil. The role of the consortium is to work with the 69 partnerships involved in the programme to:

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

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INTRODUCTION

Through involving beneficiaries, people accessing crisis support services can play an active role in shaping the services they use, and have wider influence locally and nationally. Beneficiary involvement, including beneficiary voice and co-production, has been an important priority for the HtC programme since its inception. At the outset of the HtC programme, partnerships often had limited experience of working with beneficiaries. Many HtC partnerships have made significant progress in improving how they involve beneficiaries during the five years of the programme.

This learning paper describes some of the ways HtC partnerships have involved beneficiaries during the programme. It focuses on what has been learnt about beneficiary involvement in a crisis support context. The paper sets out the factors that have enabled HtC partnerships to improve how they involve beneficiaries. More information on different types of beneficiary involvement and practical resources about how to run different activities can be found in the [co-production toolkit](#) on the HtC Google Drive and our previous learning paper on [Working with Beneficiaries](#).

This learning paper draws on LSE team resources that have previously been shared with HtC partnerships. It also summarises learning from events and case studies with HtC partnerships which have taken place in 2021. The LSE team spoke to 52 people across 15 partnerships through recent case study interviews*, and conducted in-depth consultations on the theme of beneficiary involvement, including one discussion group. The paper is structured as follows:

Section 1: Summary of beneficiary involvement during HtC – This section summarises what beneficiary involvement is and why it is important for HtC partnerships. It also includes some examples of the beneficiary involvement activities that HtC partnerships have carried out and the difference these have made.

Section 2: Delivering effective beneficiary involvement activities – This section explores what has enabled HtC partnerships to deliver successful beneficiary involvement activities. The learning draws on case studies with HtC partnerships, demonstrating how they have approached beneficiary involvement in their projects and overcome challenges.

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*At the time of writing. Case study fieldwork is ongoing.

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SUMMARY OF BENEFICIARY INVOLVEMENT THROUGHOUT HELP THROUGH CRISIS

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HTC PARTNERSHIPS HAVE INVOLVED BENEFICIARIES IN MANY DIFFERENT WAYS DURING THE HTC PROGRAMME

Beneficiary involvement covers a wide range of activities and there is no single approach that will work for all types of project or service. The diversity of projects supported by the HtC programme means partnerships have involved beneficiaries in many different ways. Beneficiary involvement activities that have been undertaken by HtC partnerships include:

Gathering feedback from beneficiaries about services

Involving beneficiaries in project delivery through **peer support** roles and **volunteering** (co-delivering)

Amplifying **beneficiary voice** through providing opportunities for beneficiaries to share their lived experience in order to influence policy and practice

Establishing beneficiary **user groups** that provide more formal and/or regular feedback

Working with beneficiaries to **shape and design** services (co-design)

Note on terminology

'Co-production' involves creating, delivering, improving and evaluating services jointly with people who will use them and stakeholders like local authorities, charities, frontline staff, funders, or academics. More information on co-production can be found in our previous learning paper on [Working with Beneficiaries](#) and in The Nationally Lottery Community Fund's online [resources on co-production](#).

In this learning paper, the term 'beneficiary involvement' is used to cover all the ways of working with beneficiaries described above. Some activities delivered by HtC partnerships are 'co-production' and some are not. However, all of these ways of working with beneficiaries can be of significant value. HtC partnerships have used different approaches to improve how they involve beneficiaries.

BENEFICIARY INVOLVEMENT CAN BRING SIGNIFICANT BENEFITS TO ORGANISATIONS, BENEFICIARIES AND WIDER STAKEHOLDERS

Partnerships identified a number of important benefits from engaging beneficiaries in their work:

- **Empowering beneficiaries.** Beneficiary involvement activities give people opportunities to make their voices heard and have a say in the way they access and receive support services. This involvement can improve beneficiaries' confidence and help them to overcome the sense of powerlessness that people accessing crisis support often experience.
- **Improving services.** HtC partnerships have found it very useful to have ongoing conversations with beneficiaries about the support they receive, including gathering more formal feedback about specific aspects of the support provided. The feedback has helped HtC partnerships adapt their services and increase beneficiary engagement with their support. For example, throughout the Covid-19 pandemic many HtC partnerships consulted with beneficiaries about how they wanted to receive support (e.g. socially distanced walks, through telephone support or over Zoom). Partnerships often adapted services based on beneficiaries' suggestions. This allowed partnerships to continue delivering support tailored to individual needs during the pandemic.
- **Supporting local influencing and campaigning.** Amplifying beneficiary voices in meetings and through local or national networks can help demonstrate the difference projects are making. Ensuring beneficiaries are heard can also support campaigning for changes in the crisis support sector. Beneficiary-led user groups set up during the HtC programme have empowered people to influence local and national policies and shape the services that affect their daily lives.
- **Supporting funding applications.** As the HtC programme comes to an end, HtC partnerships are applying for new funding. Partnerships described how different funders (including local councils) increasingly ask for evidence of co-production or beneficiary involvement. Consulting with beneficiaries can be a requirement for receiving funding. Being able to demonstrate how they involve beneficiaries and the difference this made has supported HtC partnerships as they apply for further funding.

“I think it [co-production and beneficiary involvement] is a growing area for local authorities and possibly other people that could fund that kind of work. [Doing] it will open up other opportunities as well for funding and joint work with key partners like the local authority and health service.”

Lead partner staff

EXAMPLES OF HOW HTC BENEFICIARY INVOLVEMENT ACTIVITIES HAVE INFLUENCED WIDER STRATEGIES AND POLICIES

Influencing funding strategies

Citizens Advice South Warwickshire have a **service user group**. Prior to the Covid-19 pandemic, the user group attended a community event hosted by a local funder who was seeking to develop a new funding strategy. The event organisers highlighted the need to have user voice represented at the meetings, alongside local organisations. The service user group was able to provide this voice and the beneficiaries **influenced the new funding strategy**.

"I think showed us being quite dynamic and different but also having the ability to draw on a group to be able to give a real view."

Lead partner staff

Feedback on local services

Citizens Advice Rossendale and Hyndburn held a **planning session with a beneficiary user group** to gather views on priorities for the support offered through the project in future. The partnership mentioned this session in a discussion with NHS mental health providers, who asked to meet with the user group. Beneficiaries will have the opportunity to meet NHS staff and **discuss feedback and ideas** on local mental health support provision.

"[NHS mental health providers] really want to have people they can bounce off. So, that tells me [involvement] is really significant."

Lead partner staff

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DELIVERING EFFECTIVE BENEFICIARY INVOLVEMENT ACTIVITIES

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PARTNERSHIPS DESCRIBED A NUMBER OF COMMON FACTORS THAT ENABLED THEM TO SUCCESSFULLY INVOLVE BENEFICIARIES

As set out in Section 1, a wide range of beneficiary involvement activities have been undertaken by HtC partnerships. The factors outlined below have consistently been identified by HtC partnerships as important in helping them to deliver effective beneficiary involvement activities during the HtC programme.

Achieving buy-in among stakeholders

Ensuring staff and other stakeholders involved in delivery are supportive of beneficiary involvement

Establishing a culture of involving beneficiaries

Putting beneficiary involvement at the heart of delivery and ensuring this is reflected in policy and practice

Taking a flexible, beneficiary-led approach

Allowing sufficient flexibility in the approach and being beneficiary-led to maximise engagement

Being creative when engaging beneficiaries

Considering new and innovative approaches to identify and engage beneficiaries in relevant activities

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GETTING 'BUY-IN' FROM BOTH FRONTLINE AND SENIOR STAFF IS IMPORTANT

- Partnerships said that for beneficiary involvement activities to succeed it was important to achieve **'buy-in' from different parts of the organisation** – including frontline staff and senior management. Partnerships found it challenging to progress with beneficiary involvement aims when this buy-in had not been secured.
- Frontline staff are needed to help **recruit and engage** beneficiaries. Senior management support is important to **provide backing for activities**, especially those that require time and other resources. Senior managers also may need to **encourage partner organisations** to engage with beneficiary involvement work.
- The project lead or manager is often well placed to drive engagement within an organisation. They can help keep beneficiary involvement on the agenda through **regular meetings** with both frontline staff and senior management.

Case study: Showcasing the benefits - Birmingham Mind

Birmingham Mind run a hospital discharge service which uses peer mentors with lived experience of the Birmingham Mind service to provide wrap-around support to those recently discharged from hospital. These mentors work closely with partners within hospitals, such as doctors, nurses and occupational therapists, to ensure that their clients receive the support they need. One of the key challenges peer mentors face is getting hospital staff to see the value in the non-clinical peer support work that they do. Sometimes there is a lack of open communication between hospital staff and peer mentors about patients. To address this, the partnership has taken steps to ensure hospital staff are informed about what peer mentors are doing. For example, peer mentors provide hospital staff with regular updates on what they are doing with patients and the progress they have made.

Success usually starts small, with 'proof of concept'

- Having **more than one person within an organisation** or partnership to actively 'champion' beneficiary involvement was viewed as helpful in moving forward and generating ideas.
- However, partnerships highlighted that it only takes a **small number of engaged people to 'champion' the work and get started** to build momentum within an organisation.
- Partnerships have found the best way to achieve buy-in from wider stakeholders is to **demonstrate the benefits of activities** – 'show and not tell'.



If it's you as the project co-ordinator or lead and then one or two other allies that really get it, you can really spark off of one another."

Lead partner staff

COMMUNICATING THE BENEFITS OF BENEFICIARY INVOLVEMENT IN RELEVANT WAYS CAN HELP TO ACHIEVE 'BUY-IN'

Partnerships agreed that the most effective way to secure buy-in from colleagues was communicate the benefits of beneficiary involvement in a relevant way. Clearly explaining the benefits using language and approaches that reflect the priorities of different stakeholders can help messages land effectively and increase engagement within organisations.

For frontline workers

- Communicating the core benefits of beneficiary involvement (as described in Section 1) was viewed as an important way to engage frontline staff. In particular, focusing on the **value for beneficiaries** can be effective given the role frontline staff play.
- Partnerships also said that a **change in approach** was sometimes needed among frontline staff. Partnerships described a need for support workers to shift from an approach that focuses on solving beneficiaries' problems on their behalf, to an approach that focuses on **supporting beneficiaries to address problems themselves**.
- Partnerships suggested **providing training** (including through staff inductions) to explain beneficiary involvement and equip staff to shift their approach. Training can also help encourage staff **not to make assumptions** about beneficiaries' capabilities.

For senior management

- Partnerships that had successfully engaged senior management highlighted the need to **keep beneficiary involvement top of mind**. One way this happens is through consistently raising beneficiary involvement in meetings.
- Partnerships also described **using the 'language' of senior management** to increase engagement and secure support for beneficiary involvement. For example, **Community Links** explained how they engaged senior stakeholders by clearly showing **how beneficiary involvement activities related to the organisations' overall aims** and highlighting **interest from funders** in the topic.

“Not making a judgement about what they're [beneficiaries] capable of doing or what they're ready for - let's just talk to them about it”

Lead partner staff

“Our staff... would say that they know what clients want and they really care - but they're sort of being like a protective mother.”

Lead partner staff

“Influencing [senior managers] and getting their buy in was a challenge we overcame. It was a win in terms of just shifting people's perspectives or bringing co-production to the table when it wasn't there.”

Lead partner staff

PUTTING BENEFICIARIES AT THE HEART OF SERVICE DESIGN AND EMBEDDING RELEVANT POLICIES CAN HELP SHIFT MINDSETS

- Partnerships that had successfully developed their beneficiary involvement work (including some co-production activities) described **creating a culture change** where beneficiary involvement was at the heart of everything they do.
- These partnerships found that the more beneficiary involvement is embedded in the work of an organisation, the easier it becomes. They highlighted that a **shift in mindset** was often needed to ensure that beneficiaries are at the centre of the organisations' work – and not just viewed as 'service users'.
- Partnerships have embedded beneficiary involvement work into their organisations in a variety of ways, such as:
 - Ensuring beneficiary involvement activities are **aligned to wider policies and priorities**
 - Incorporating relevant aims into **business plans or strategies**
 - Involving beneficiaries in project delivery approaches, for example through **employing peer support** workers with lived experience

I think it's that cultural change where you are seeing a service user, not just somebody that's coming in getting advice and sorted out and off they go again. They are ... impacted and being valued.

Lead partner staff

Case study: Embedding beneficiary involvement policies - Rossendale and Hyndburn CAB

When Rossendale and Hyndburn Citizens Advice updated their **business plan** they decided to make co-production and beneficiary involvement a **cross-cutting theme**. They included beneficiary involvement in their plans for research, campaigns, training and recruitment.

Rossendale and Hyndburn Citizens Advice described how this helped them to **embed co-production and beneficiary involvement** within the organisation so that even if funding for specific projects ends, the work can continue. Their strategy for beneficiary involvement also **aligns with the diversity and inclusion priorities** of National Citizens Advice.

They are making further plans to be beneficiary involvement '**champions**' among their partner organisations and help facilitate the growth of beneficiary involvement work in the partnership.

USING A FLEXIBLE APPROACH CREATES OPPORTUNITIES

- Partnerships consistently highlighted the importance of flexibility when developing beneficiary involvement. Taking a flexible approach was central to the success of **beneficiary-led activities**. Partnerships described being led by beneficiaries' strengths and skills and allowing beneficiaries to decide what to discuss and work on with services. This flexible approach was seen as important for successful beneficiary engagement. However, partnerships also said it was important to ensure activities were relevant and useful to the partnership and the support delivered.
- Flexibility is also important for partnerships to **take advantage of different opportunities to involve beneficiaries**. Partnerships described how successful beneficiary involvement often happened by being responsive, rather than always working through formal processes. For example, if a beneficiary raises an issue, it can be helpful to discuss this with other beneficiaries informally or as part of an existing support session or group.

Case study: Using informal approaches – KeyRing Ancora project

KeyRing provides immediate and ongoing support to people in Oldham. One of their core activities is 'That Thursday Thing', a peer support group that meets (face-to-face, before Covid-19) every Thursday. The partnership described how opportunities for beneficiary involvement **emerged naturally** from this activity. For example, during one session a beneficiary raised an issue about a local drug service and the project used this opportunity to explore what people thought and provided feedback to the drug service. Another example was when a core staff member was absent and the project lead asked one of the beneficiaries to take the lead role in the session, alongside another Ancora worker. The beneficiary took responsibility for getting the group to choose the discussion topic and getting it underway. KeyRing stressed the importance of allowing beneficiary involvement to develop naturally and taking opportunities to encourage and support beneficiaries to take part in different activities.



'That Thursday Thing', initially, that was just about creating an opportunity for people to come together ... we just let [opportunities for beneficiary voice] evolve really naturally ... I think it's about encouraging people.

Lead partner staff



Ancora originally put me forward (for a local poverty user group) ... they said 'Because you have experience of poverty and so forth,' they said to me, 'Why don't you go down there?'

Ancora beneficiary

PARTNERSHIPS HAVE ENGAGED BENEFICIARIES IN DIFFERENT WAYS AND EMBEDDED INVOLVEMENT IN ENJOYABLE ACTIVITIES

- A key challenge for developing beneficiary involvement is identifying and engaging beneficiaries who are willing to get involved. Each partnership works differently and supports different beneficiary groups and there is **no 'one-sized' fits all** approach. However, effectively **communicating the benefits** of taking part is important to achieving engagement. For beneficiaries, benefits could include a chance to **develop skills** and **have a say** in how the service they are using are delivered.
- Partnerships have used **creative methods** to identify beneficiaries who want to get involved, and to engage them over the long term. Some examples are outlined below. More information on 'hooks' that can be helpful to engage beneficiaries can be found in our [Co-production toolkit](#) on Google Drive.



*You need to think:
How does it
benefit the client,
rather than just
ticking boxes?"*

Lead partner staff

Embedding involvement in a 'fun' activity - Partnerships described introducing opportunities for beneficiary involvement in an informal way, especially at the beginning. Inviting beneficiaries to an activity they will enjoy and including beneficiary involvement 'aims' within this activity was seen as a good way to engage people who might otherwise be reluctant to take part.

Thinking broadly about who to speak to – One partnership, South Warwickshire Citizens Advice, identified and recruited beneficiaries to take part in a user feedback group work who were part of another project run by the same organisation.

Using social media – One partnership, Rossendale and Hyndburn Citizens Advice, regularly promotes beneficiary involvement activities on social media and has created a social media group where they share information on upcoming events.

Making activities involving beneficiaries enjoyable - Community Links

Community Links offer wrap-around crisis support in London. The partnership decided to hold activities for beneficiaries with a view to doing co-production, but attendance was low. Some beneficiaries suggested including cross stitching and journaling within the existing peer support group sessions. This was successful in encouraging engagement from a larger number of beneficiaries. Community Links used these informal sessions as an opportunity to consult beneficiaries about issues of collective concern to support their beneficiary involvement aims.

KEY TAKEOUTS – REMEMBER ...

It takes time and persistence to embed beneficiary involvement

- Partnerships highlighted the importance of having patience and appreciating that successful beneficiary involvement can take time. While starting beneficiary involvement activities may not bring immediate change, partnerships agreed that persevering was key to success.

Working with a small number of very engaged beneficiaries can be effective

- Some partnerships were initially concerned that they had not engaged large numbers of beneficiaries. However, those that had success in developing user groups highlighted that a small number of people that are really engaged works very well.

It doesn't need huge amounts of resource

- Partnerships recognised the challenges around dedicating resource to beneficiary involvement, particularly in the context of needing to focus on delivering support. However, partnerships described how beneficiary involvement had been incorporated into different aspects of people's roles and that it could start with small activities with few resource implications.

Informal approaches are often a good place to start

- Some partnerships were worried about undertaking formal beneficiary involvement activities such as user groups, especially at the beginning of their project. Feedback from partnerships highlighted examples of successful beneficiary involvement that had started more informally. Being flexible and ready to identify opportunities to engage beneficiaries is crucial. It is also important to be encouraging and supportive. Formal strategies are helpful but should be flexible.

Not all beneficiaries will want to get involved – but some will

- Partnerships described a misconception that beneficiaries do not want to get involved. Instead, partnerships have found that when opportunities are presented in the right way, many beneficiaries will be interested in taking part.

I think that we initially might have been driving and trying to get a lot of people as opposed to the people who wanted to engage and a quality few."

Lead partner staff

[It] doesn't have to cost money, it doesn't even have to cost much time really. Really if it's there in everybody's head."

Lead partner staff

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FURTHER RESOURCES

A variety of additional resources on beneficiary involvement are available on the [HtC Google Drive](#) and the [HtC document library](#):

- The [Working with beneficiaries](#) learning paper includes further examples of how HtC partnerships are working with beneficiaries. It includes examples of how HtC partnerships have set up user groups and more examples of where beneficiary feedback has shaped HtC services or had a national or local influence.
- The [Summary of 2020 Co-production Workshops](#) document summarises the main themes from the HtC co-production workshops that were delivered in early 2020.
- The [Remote co-production webinar summary](#) recaps the findings from a webinar run in 2020 about how to engage with beneficiary groups remotely during the Covid-19 pandemic.
- [The transition from beneficiary to volunteer in crisis support](#) literature scan synthesises and presents contemporary research and good practice on the topic of the transition from beneficiary to volunteer in crisis support.
- [An introduction to Co-production](#) paper includes definitions and more information on principles of co-production, as well as further examples of what co-production looks like in practice.
- The [Guide to co-producing governance and designing services](#) offers practical advice on how to co-produce governance and service design, as well as how to develop action points for your organisation.
- The [Guide to developing peer support & setting up groups](#) includes definitions and explanations of different types of peer support, along with case studies of peer support from the HtC programme.

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As ever, if you have anything in particular you would like support with, please feel free to contact us at: HelpThroughCrisis@ipsos-mori.com

THANK YOU!

We'd like to thank all the HtC partnerships who spoke to us and contributed examples to this paper:

Coventry Citizens Advice

East End Citizens Advice

KeyRing - Living Support Networks

Manchester Mind

Re:store Northampton

Women Centre Halifax

Telford & Wrekin Citizens Advice

South Warwickshire Citizens Advice

Citizens Advice Rossendale and Hyndburn

Community Links Trust

Middlesbrough & Stockton Mind

Birmingham Mind

Oasis Community Housing

Brentwood Middleton Day Centre

Fiscus North

Luton Citizens Advice

Mid Norfolk 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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