

Engaging Well: getting the type and level of beneficiary engagement right

Introduction

Partnerships across the Help through Crisis (HtC) programme are providing much-needed support to meet the immediate needs of people experiencing crisis in their lives and helping address the underlying causes of hardship crisis. By grappling with how to engage beneficiaries beyond their immediate crisis, partnerships are developing approaches to help people to move on from advice services and support when they are ready. In this way, they aim to support beneficiaries to reduce the occurrence of future crises by building resilience. This report looks at how HtC partnerships are supporting people along this journey.

This is an issue almost all the HtC projects are seeking to address, and there is no “one size fits all” approach or solution. At the national event in September 2017, long-term user engagement was the topic partnerships wanted to discuss the most. Lots of great ideas are being tested and tried out across the programme. **We wanted to share some of these approaches and hope you’ll be able to share what you’re trying out too – either on [Slack](#) or by passing on examples to your Ipsos MORI or NEF Consulting relationship manager.**

The tactics and tips shared in this report will be familiar to many of you. The aim of this learning report is to capture these, showcasing examples of where engagement has been successful in the longer-term, and suggesting methods which may have contributed to this. This report is based on three case studies that were designed to explore the experiences of partnerships who have been tackling long-term engagement, as well as calls with other partnerships, discussion about long-term engagement on Slack, material from the national and regional events, and conversations between partnerships and their relationship managers.

As ever, let us know if there’s anything you’d value support with or areas where you’d like to learn more from the partnerships involved in the programme.

Help through Crisis support team

Contents

Introduction.....	1
What do we mean by long term engagement and why does it matter?	2
Case study: Helping People through Crisis, Mid & South Norfolk Advice & Support	3
Five approaches with practical tips suggested by partnerships.....	4
Case study: Help Through Crisis Ealing	7
Combatting common barriers	8
Case study: SHAP	9
Appendix A: Example Action Plan	10
Appendix B: Example Closing Certificate.....	11

What do we mean by long term engagement and why does it matter?

Providing support to beneficiaries beyond an immediate crisis is central to the HtC programme. Continuing to connect and engage with people is fundamental for building resilience and helping ensure beneficiaries have the contacts and tools to tackle future challenges. Long term engagement supports this in three key ways:

- **Delivery:** partnerships are providing longer-term support, training and one to one sessions once an immediate crisis has been resolved. This supports people to improve their circumstances, become more resilient to future challenges, plan for the future and take advantage of opportunities as a way of preventing the recurrence of hardship crisis in their local area. For example, Ealing CVS have expanded their offering as much as they can to support clients in as many ways as possible, such as offering resilience counselling and various life-skills workshops. They have adapted the delivery of these services, acknowledging that one-to-one appointments may not always be the best way to engage and support some clients (see page 7 for a detailed case study).
- **Evaluation:** reconnecting with beneficiaries to see how they are getting on and follow up on the progress they've made is helping partnerships to track the impact of their work, and improve services based on what is (and is not) working, ultimately making services better for the people that use them. For example, Mid & South Norfolk Advice & Support contact their clients after the crisis has been resolved and update their progress against Outcomes Stars¹ and wellbeing and mental health outcomes². At this stage, they also record feedback from clients and upload all the documents to an online platform for filing. This allows them to track the client's progress (see page 3 for a detailed case study).
- **Beneficiary voice:** partnerships are continuing to keep in touch with clients and involve them in how projects are being managed and delivered. The aim is to co-produce support approaches and amplify beneficiary voice within a service or region to improve services by ensuring lived experience is at the heart of how services are designed and delivered. Ultimately, this will lead to better support that meets the needs and lives of service-users, helping to prevent the recurrence of hardship crisis. For example, Ealing CVS reflected on the valuable, continued involvement of one of their beneficiaries. Josie wanted to give back to the project, who had helped her enormously, so she now acts as a peer support and sits on the steering board for the project. Her involvement with the organisational side of the project has brought some changes to how it is run, and has helped them to engage more people long-term, for example by supporting Ealing CVS to reposition themselves in their initial communication with clients. This is because she, and the project, recognise that some clients may be suspicious of help based on previous negative experiences. Josie's suggestions helped the project to adapt their visibility at foodbanks so they clearly demonstrate the services they offer, such as through screening [client success videos](#).

¹<http://www.outcomesstar.org.uk/>

² <https://warwick.ac.uk/fac/med/research/platform/wemwbs/>

Case study: Helping People through Crisis, Mid & South Norfolk Advice & Support

The Helping People through Crisis project brings together several voluntary sector organisations from across Mid and South Norfolk to provide support for people in crisis across Breckland and South Norfolk.

Their approach to promoting engagement

- Clients are referred to Advice Champions. Working together, clients and Advice Champions create an action plan summarising the situation in a clients' own words and agreeing a list of actions (a template is provided in appendix A). The plan also includes a list of links to other organisations and available support. Advice Champions work with clients to complete the action plan, providing support to attend meetings and signposting to other services.
- Advice Champions always put their telephone number and name in a client's phone so they know who is calling and don't avoid an unknown number.
- They also give out business cards and diaries so clients don't lose their details and have a record of their next appointment. Diaries are something tangible for clients, making it more likely they'll remember the next meeting.
- Advice Champions will follow up with a text message ahead of an appointment. This works better than a call as clients can respond when they have the time and is more informal and thus less off-putting to some. They are also careful to set the right tone in their communications, keeping a level of friendly professionalism and letting clients know that they are using a work phone that is not switched on outside of office hours. This helps to set the right boundaries in place.
- They also send postcards (in envelopes to avoid any confidentiality concerns) to clients – either with a personal message from the Advice Champion or with a reminder of their details and a note to "let us know how you are getting on".

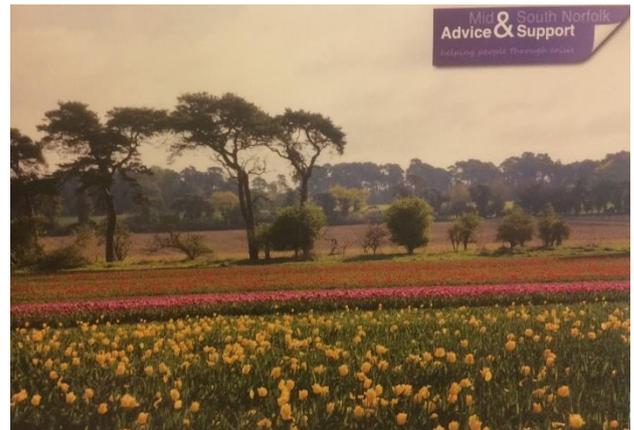


Figure 1: Postcard used by Advice Champions to send to clients

Mid & South Norfolk Advice & Support find that using a mix of the methods described above, and tailoring these to a particular client is the most effective approach to keeping people engaged beyond an immediate crisis. They are still trying new approaches and adapting their project to the needs of users.

Five approaches with practical tips suggested by partnerships

1. Tailored and flexible support

Adapting support is key to keeping clients engaged long-term, shaping services around the needs of an individual and coming up with creative solutions, rather than taking a formulaic approach.

- By offering a wide range of services, from support planning to cooking workshops, partnerships can support beneficiaries with their bespoke needs and encourage long-term engagement as the services are relevant and useful to the client.
- Varying the level and method of support (as well as the service) also helps to make it relevant for clients. For example, some clients may need less support than others, so simply checking up on them is sufficient. Others may need more involved support to help them move on from hardship crisis.
- Having a flexible mix of approaches including peer-support, drop-in sessions or offering extended one-to-one sessions means there are a range of options for clients to engage with a service in a way they are comfortable with and this can be updated over time depending on demand.
- Signposting clients to wider partner organisations also aids in engagement as the needs of the client can be met even where HtC partners may not be able to offer the right kind of advice.



Giving clients the opportunity to be supported in different ways has been successful in encouraging longer-term engagement.



Ealing CVS begins by providing support to aid initial crises, such as financial & support planning, then offer bespoke support down the line, such as CV help or website design.

2. Carefully navigating initial conversations to focus on strengths

Setting the right tone and moving towards discussing people's strengths as soon as is appropriate is key.

- This means that support and future opportunities are shaped around what individuals can do, rather than focusing on the problems they face because of their immediate crisis.
- Ensuring that expectations are managed, so the client knows what they can gain from the programme, can also help set the right tone and support constructive conversations.
- The helping people through crisis project in Mid & South Norfolk (case study on page 3) starts by having conversations with a client about the services they can provide and the role of the advice champion so they are clear on what to expect. They are also careful about tweaking language to create an equal and relaxed relationship e.g. describing a support "agreement" rather than a "contract".



Understanding where the client is on their journey is crucial to tailoring support appropriately for clients.

3. Valuing peers with similar experiences.

Involving peers can help to inspire those at the beginning of their journey to stay engaged, shape the organisation in the future to ensure support is creative and tailored around individuals, as well as providing a route to maintaining engagement.

- For example, Ealing CVS's **peer support drop-ins** help to provide newer clients with a sense of community as well as demonstrating how their crisis can be resolved through completing the programme. These drop-ins occur each week, and have a few peers who have completed the programme available to share experiences with newer members.
- Volunteering opportunities** for beneficiaries mean they maintain a connection to the organisation and allow people to give back having moved on from the more involved client relationship with an advisor.
- Demonstrating there are opportunities to remain involved in an organisation** beyond crisis support can be reassuring, such as by sitting on steering committees.



"We try to tailor ongoing support to developing need, so when crisis is resolved it might be time for the client to get involved in helping support others or supporting us to deliver a budgeting group."

- Sara, Slack discussion



Group support sessions and skill-building workshops are viewed as especially valuable for SHAP as they help clients re-engage with society, feel less socially isolated, and grow confidence.

4. Agreeing a plan with clear milestones

Plans and milestones can help to provide motivation or direction towards a client's goals, keep track of actions and demonstrate how far someone has come while also marking an end point when they have moved on from support.

- Developing a written action plan** for each client helps to keep clients focused, provides a digestible record of the actions agreed, and allows clients to see their next steps. The plan can be **referred to throughout their journey**, illustrating what has been achieved and how far they have travelled.
- Clients are encouraged to **keep in touch** even if they have not completed the steps on the plan. This is important for not discouraging clients if they are unable to complete something they had agreed to. For example, the helping people through crisis project in Mid & South Norfolk work with clients to draft an action plan using the template in Appendix A (page 10), getting to know the client and working together to draft the document including any actions agreed.



Giving clients a personalised action plan can help to keep them focused throughout their journey.

- The plan is written in the client's own words and they collectively agree which other local services they might want to self-refer to (with information about these organisations provided on the plan).
- Tracking progress against the plan can involve using standard measures like outcome stars, as well as a tailored list of aims agreed at the outset.

The SHAP project have found having the client achieve an easy win early on near the start of their journey can help to increase confidence in the programme and inspire continued engagement.

5. Developing a trusting and professional relationship

Positive relationships form the foundation of Help through Crisis projects and the support being provided. Getting the relationship started on the right footing is therefore an important part of long term engagement.

"It's a fine line between continued engagement and creating dependency - we need to be as responsive as we can to the individual's needs, but focus on the outcomes we CAN achieve."

- Sue, Slack discussion

- Having the **same advisor** continue to see a client and establishing a **one to one relationship**, and giving **feasible advice** that aligns with a client's circumstances all help to encourage engagement and ensure access to support within professional limits.
- **Setting boundaries and making the support offer or agreement clear.** This includes being clear about why you are asking beneficiaries questions, or to provide information, as well as being honest about the parameters of support. For example, the SHAP project state what is being offered in order to manage client expectations and ensure the relationship between the case workers and the beneficiary are professional and honest; knowing what is offered from each side (see case study on page 9).
- Using this type of approach **allows the tone for the relationship to be set from the start.** Several partnerships ensure the client has the work phone number of their advice champion or support worker so they don't avoid calls from unknown numbers.
- Providing clients with business cards and diaries helps to **make details readily available**, increasing likelihood of contact (see Mid and South Norfolk case study on page 3). Some projects have also found it effective to **contact the client prior to sessions** to confirm attendance.
- When multiple organisations are involved, some projects have found using **online software useful in tracking the progress** of each client meaning that different advisors can take a co-ordinated approach to support, referring back to previous conversations (see Ealing CVS case study on page 7).
- **Referring to named colleagues** at other organisations when discussing referral options can also help make a new service feel less intimidating and reassure clients they are trusted and known. This is an approach the Advice Champions at the helping people through crisis project in Mid & South Norfolk have taken when signposting clients to other organisations involved in their partnership (see page 3).



Giving clients diaries and sending postcards has been successful in upkeeping contact and creating a rapport with the client.

Case study: Help Through Crisis Ealing

The help through crisis project in Ealing is supported by Ealing Foodbank, MIND, Ealing Equality Council, Ealing Law Centre, Ealing CVS, as well as a range of ethnic community groups within the borough. Clients are supported in various ways throughout their journey and may be referred between organisations. The progress of each client is tracked across these organisations by using the online platform Trello.

Their approach to promoting engagement

- The project engages clients in two stages; stage 1 (immediate crisis) and stage 2 (building resilience).
- Clients are initially engaged during a food bank visit and offered further support from advisors.
- Advisors set up the first appointment and then follow up with further support sessions with the same advisor.
- After progress has been made with the initial crisis, clients can be moved onto support from more specialised volunteers and services, who support a very wide range of needs, such as support planning and resilience building,
- Around 10 support sessions are offered to each client. The number of sessions can be more or less, depending on the needs of the client.
- Drop-in sessions each week aim to ease clients from stage 1 to stage 2. Key advisors and supporters from both stages attend, as well as clients who have completed the programme offering peer support. This stage helps inspire clients and understand which services can be offered to them.

'The Best Things in Life Are Free'
– a new monthly drop in session
for people like you





There's some great things out there that are free, it's just a question of knowing how to get them before they go! We think you could maybe do with a few treats and freebies, so that's why we're setting up a new monthly drop-in session, as we want to make sure you're first in queue to receive them.

It's also an opportunity to chat to other people we've helped, share experiences and catch up with the team along the way too. Of course, there's FREE tea, coffee and biscuits!

So make sure you come along to 'The Best Things in Life Are Free' sessions at the Lido Centre, 63 Mattock Lane, Ealing W13 9LA from 10am to 12noon.
Children welcome.

Tuesday 10 th October	Tuesday 6 th March
Tuesday 7 th November	Tuesday 3 rd April
Tuesday 5 th December	Tuesday 2 nd May
Tuesday 9 th January	Tuesday 5 th June
Tuesday 6 th February	

Find out how to access:
Free courses, free training, free entry to local exhibitions,
free activities for children, free goodies!



Ealing CVS adapted the services available to encourage long-term engagement and support clients with as many needs as possible, such as re-building careers or supporting the family of the client. They began offering group sessions and activities because they saw that some clients found it easier to learn in the format. They now offer a wider-range of services including a six-week workshop around healthy eating on a budget which was very popular, English language lessons at a local partner organisation and engaging clients using "stealth learning". This involves using games and informal conversations to build skills. The language lessons focus on basic communication skills so that clients are able to hold conversations with key figures in theirs, and their family's lives, such as doctors or teachers. These services can be explored flexibly depending on the client's needs.

At the end of the sessions they create an action plan for avoiding future crisis and clients are given a closing letter/certificate which highlights their goals and achievements across the course (a template is provided in appendix B). Within this closing letter, clients are invited to give feedback about the project and are offered vouchers or £50 towards a course of their choosing. Ealing CVS contact the client 3 months later to check up on their progress.

Combatting common barriers

Below we summarise some of the ways HtC partnerships have tried to tackle common barriers to long term engagement. Some of these may not be suitable for the work you do, but hopefully they will give you ideas you can try as you work with your beneficiaries to support them in ongoing ways, beyond immediate crisis.

Barriers	Potential solutions to consider
Client anxiety/ mistrust based on previous experience of engaging with agencies	<ul style="list-style-type: none"> Utilising peer-support networks to demonstrate and reassure newer members about the aims of the project; that they <i>really are</i> there to help. This may be needed as a result of previous negative experiences with local authorities or charities. Making resources available at the initial meeting, such as client success videos, to reassure those in crisis of the intentions of the project as well as the support they can expect.
Geographical barriers to attending meetings – particularly in rural locations.	<ul style="list-style-type: none"> Offering services at different locations more convenient for beneficiaries – e.g. by booking in space in partner organisations rather than expecting clients to come to where an advisor is based Conducting meetings using technology if appropriate – e.g. via Skype. Offering travel cards and vouchers to trusted clients to help them reach their appointments.
Limited project resources, such as limited staff time	<ul style="list-style-type: none"> Ensuring that support is shared as much as possible across partner organisations, moving clients between support workers if needed. Calling the clients on the day of an appointment to ensure attendance, and if they cannot attend, offering this slot to another client. Giving clients diaries to keep track of their appointments and writing the date and time of the next appointment in the diary at each meeting.
Language and communication barriers	<ul style="list-style-type: none"> Enrolling potential and current clients in English language courses so that the project is able to support them further. Initially focusing on helping clients to communicate with key figures, such as teachers and doctors, so they can hold conversations that matter and affect their lives. (See Ealing CVS case study on page 8) Providing information not only in English, but also in languages key to the area's population. Ealing CVS found it useful to present a client success video in Polish.
Avoiding a relationship of dependency and communicating the point at which a client is ready to move on.	<ul style="list-style-type: none"> Using a closing letter to highlight a client's journey, showing their goals and what they have achieved (Ealing CVS has developed a template, which is include on p11). Providing an advisor's work telephone number and explaining the hours they are available but that they will get back to a client when they can. Signposting beneficiaries to community groups, which help provide them with support when they no longer need the advice organisation. Changing the case worker assigned to a client in extreme cases.

Case study: Changes - Bringing Balance Back project, SHAP, Liverpool

As part of the Bringing Balance Back project, SHAP offers advice and support for individuals, couples, and families who repeatedly experience homelessness, risk of eviction, debt, social exclusion due to poor mental health, and inability to work because of underlying issues. The project is supported by SHAP, Merseyside Law Centre, Halton Engagement Partnership, TASC (Tailored Advice Services in the Community), and Health First Team. The team is focused in and around Liverpool.

Their approach to promoting engagement

- The project engages clients for 6-12 months to try to ensure that not only their immediate crisis can be addressed, but additional needs can be met.
- Clients are offered one to one coaching as well as various training courses & workshops, such as an on a budget healthy cooking course. This helps to keep them engaged based on their specific requirements and preferences.
- The Changes team try to ensure, where possible, that the same coach sees the same clients. This is so that a trusting, one to one relationship can develop.
- Development of the client is tracked using a Rickter scale, where the client can assess how they feel at different points in their journey. This is a physical scale, making it more tangible to the client, and brings a sense of reality as they can touch & interact with (see Figure 2).
- Clients are invited to participate in a 7-week programme delivered by Health First Team which focuses on healthy eating, nutrition, and gentle exercise. This is a critical section of the overall programme for helping clients learn, feel physically healthier, and it provides a space where clients can bond over shared experience, work on their confidence, and learn from each other. SHAP and the Changes team see the value in peer-engagement as it not only shows the clients that they are not alone, but also encourages clients to begin overcoming any social isolation and confidence issues they may be feeling.
- A variety of other services are offered, such as a range of accommodation options and workshops about personal finance, benefit management, and handling emotional responses to money.

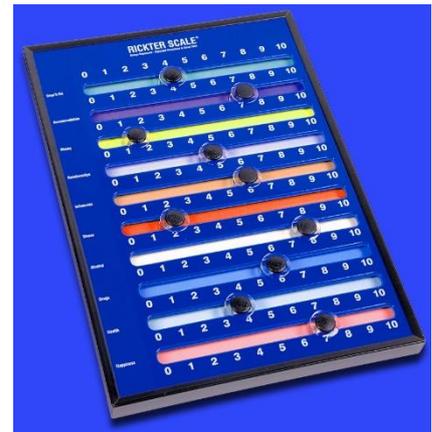


Figure 2: Rickter scale used to track progress

SHAP and the Changes team recognise the need to have flexibility within the programme, with some clients not involved with some aspects of the programme, depending on the focus. They understand that sometimes a client is not ready to be enrolled on the programme at that point in time, and may re-contact those clients at a later stage to engage them. They also acknowledge that their processes for encouraging long term engagement will not work on their own: the motivation to complete the programme must come from the client to be successful. However, in some cases they feel they have encouraged this engagement in practical ways, like by helping clients attend meetings by organising transport.

Appendix A: Example Action Plan

Mid & South Norfolk Advice & Support

helping people through crisis

(Use CAB headed paper)

Checklist (delete this box before handing to client)

- 1) Complete Personal Plan and hand page one to client
- 2) Complete Casebook enquiry and AICs in normal way
- 3) Complete first plot on outcomes star below
- 4) Complete W&E health outcomes (if not already done with DP form) and record in Casebook
- 5) After first interview produce journey map up to coming to see Advice Champion
- 6) After a few days, text client to ask if they have completed actions/made appointment (use screenshot to copy send your text and theirs to email and then paste into Casebook as evidence)
- 7) When crisis resolved, contact client for update and complete second plot on outcomes star and W&E health outcomes.
- 8) Record update, client outcomes and feedback in enquiry section and AIC sections in Casebook and upload the above documents.

Date: 25/10/16

Dear Mr XXXXXXXXX

Ref: Action plan agreed - Reference XXXXXXXX

During our meeting on 24/10/16 you explained that you..... We agreed the action plan below:

Actions agreed to resolve immediate crisis

- xxxxxxxxxxxxxxxx
- Appointment booked for you with Bureau debt adviser 26/10/16
- To accept calls, texts and emails from me and to keep me updated
- For me to contact you regularly to find out if things have improved

Ask client to put your mob no in their contact list and ask if you can email them useful info. Help client put key dates in a diary or their phone. Give them a diary if required.

I have listed some suggestions that you may find useful in the future:

Future plans

- xxxxx
- xxxxx
- xxxxx
- IT - free online courses <http://www.learndirect.com/maths-english-and-it> Free face to face IT courses at local library (Dereham library). Let me know if you would be interested.
- **Attending Wellbeing drop in sessions** <http://nsft.wpengine.com/courses/search/> leaflet supplied
- **General advice** www.citizensadvice.org.uk

Suggest small, manageable, practical things, like taking an hour to start the actions above. Identify dates and help client put them in their diary/phone. Text clients to check progress, and screenshot text into Casebook.

Ask client for their suggestions for service changes to improve their situation.

You suggested that better communication of the need to notify DWP about a change of circumstances would help your situation in the future.

I will contact you by calling or texting and it would be really helpful if you could respond to this contact and keep me informed about your situation. **If you don't manage to complete the things above please still contact me so we can plan the best course of action.** You can contact me on: Tel xxxxxxxx, mobile xxxxxx, email xxxxxxxx

Kind regards

XXXXXXX

Advice Champion

Ask client for their initial feedback on the interview and plan and record in Casebook

Appendix B: Example Closing Certificate

Ealing CVS use the example certificate below after a client has come to the end of their initial support (normally around ten appointments). It includes a summary of the progress a client has made and a list of actions mapping out a client's next steps that they can refer back to. It also includes information about further services, and offers vouchers that can be used to support a client build skills through training or courses. The certificate also helps to prepare clients that Ealing CVS will be back in touch in about three months' time, so they are not surprised when further contact is made and they are reassured that the Ealing CVS team remains engaged if they do need further support.



Dear *(insert client name)*,

This is to confirm that your short-term intervention programme delivered by Help Through Crisis Ealing has now come to an end. Over the past few sessions, we have:
(insert bullet points of what has been achieved here).

We hope you've found the service valuable and that you are feeling more confident to face the future.

To summarise, towards the end of the programme you have agreed to:
(insert bullets relating to Action Plan here)

We would really welcome your feedback on the Help Through Crisis service and would be very grateful if you could either complete the feedback form and return it to *(insert name)*, Help Through Crisis Ealing, The Lido Centre, 63 Mattock Lane, Ealing W13 9LA or complete the feedback form online [here](#).

Once we've received your feedback (either by post or in person or online), we would like to thank you for your commitment to the programme by offering you either £X worth of High Street shopping vouchers or £50 towards any course of your choice. It could be a yoga course, a cookery course or an IT course. Whatever you're interested in, just let *(insert name)* know and we can find something for you. There's a fantastic selection of courses available at Open Ealing, a local Arts Centre www.openealing.com.

When your feedback has been returned, please email *(insert email)* or call *(insert name)* on *(insert phone number)* to let *(insert name)* know if you would prefer the shopping vouchers or access to a course.

We'll be in touch again in 3 months time to see how you are and also to see how you're progressing towards your goals outlined in your Action Plan. In the mean time we wish you every success for the future.

Best wishes

The Help Through Crisis Team