

THE GILFILLAN PARTNERSHIP
RESEARCH AND CONSULTANCY SERVICES

Evaluation of
Working Together for Advice

FINAL REPORT

EXECUTIVE SUMMARY

February 2011



advice
services
alliance



About Working Together for Advice

The Working Together for Advice (WTfA) project was funded by the Big Lottery Fund to develop a range of support services for independent advice centres in England. The project received £5,714,742 funding over a three year period from January 2008 to December 2010.

The overall aims of the WTfA project were to:

- Increase access to advice;
- Enhance the quality of advice;
- Demonstrate the value of advice;
- Improve the efficiency of advice services;
- Build the capacity of the advice sector.

The project was developed and delivered by a partnership of six advice networks. The lead partner for the project was the Advice Services Alliance (ASA). The other project partners were Advice UK, Citizens Advice, Law Centres Federation, Youth Access and Age UK. Between them, the project partners have over 1,600 advice agency members across England.

Project activity was managed within eight workstreams. Each workstream was managed by a full time workstream manager and steered by a workstream management board made up of representatives from the WTfA partner organisations. The eight workstreams were:

1. Developing access to advice services – which aimed to improve the accessibility of advice services to those with greatest need.
2. User and stakeholder involvement – which aimed to increase user and stakeholder involvement in the management and development of advice services.
3. Enhancing frontline advice – which aimed to improve the development, performance and co-operation of frontline advice services.
4. Developing a quality mark – which aimed to develop a national scheme for accrediting agencies providing advice services.
5. Advice outcomes – which aimed to enable the sector to better demonstrate the value of advice work and its beneficial impact on the lives of advice agency users.
6. Developing discrimination advice – which aimed to develop the provision of discrimination advice.
7. Workforce development and training – which aimed to develop a coordinated approach to workforce development and training.
8. Promoting advice – which aimed to promote advice services to those who need advice and to decision makers.

Evaluation approach and methods

The Gilfillan Partnership was commissioned in September 2009 to carry out an external evaluation of WTfA. The evaluation was required to address the following key questions:

- Has the project achieved its formal outcomes?
- Has it achieved tangible benefits for advice agencies?
- Has a partnership approach been an effective method of delivery?
- Has the project delivered good value for money?
- What lessons can be learned for future partnership work?

The evaluation also considers the following questions:

- Did the project meet all of its milestones?
- Has the project management structure been effective and efficient?
- What are advice agencies' priorities for future support from the WTfA project partners?

The overall project evaluation was commissioned independently of the evaluation activities which took place for each workstream. A mix of internal and external evaluation activities were carried out for each workstream and the scope of these evaluations varied between workstreams.

A range of evaluation methods was used. The principle methods used to evaluate the achievement of formal outcomes and the benefits for advice agencies were a survey of, and interviews with advice agencies; 240 advice agencies responded to the survey questionnaire and interviews were conducted with a further 31 advice agencies. Full details of the methods used to evaluate the WTfA project are included in the evaluation framework, which is in Appendix One of the full evaluation report.

Evaluation findings

Did the project meet all of its milestones?

The project met almost all of its milestones. Where original milestones were not met, these were renegotiated with the Big Lottery and replacement milestones were agreed.

Has the project achieved tangible benefits for advice agencies?

The project has achieved a range of tangible benefits, both for advice agencies which directly participated in the project activities and for the sector more widely. The principle benefits for participating agencies included staff training, support to develop organisational capacity, and the opportunity to pilot new approaches to improving advice services. At least 500 advice agencies directly benefited from these activities during the project lifetime. The actual number is difficult to determine and may be much higher. Many more advice agencies will benefit in the longer term from the products and resources developed by the WTfA project.

Has the project achieved its formal outcomes?

Five formal outcomes were established for the WTfA project. These were:

Outcome one: At least 1,700 frontline agencies will be empowered to reach further into disadvantaged communities ensuring that 10% more people get the advice they need to turn their lives around;

Outcome two: 750 advice agencies will be better equipped to deliver more effective advice services based on the needs of advice users and stakeholders. The introduction of a sector-wide quality mark will ensure that all advice agencies have the right systems in place to be able to measure and improve the quality of their advice to clients on an on-going basis;

Outcome three: The development of an outcomes toolkit that can be used by all advice agencies to demonstrate the value of the work they do. The use of that data in the promotion of advice services will enable maintenance of effective and influential relationships with decision makers and reach some of the 4 million people who experience problems but do not seek advice;

Outcome four: Improved efficiency of advice services by supporting the development of referral networks and partnership working in at least 20 areas of England;

Outcome five: Through a co-ordinated workforce development and training strategy 800 advisers will be trained across the sector to deliver a high quality and expanded service to clients and develop a qualifications and accreditation framework which will ensure an increase of 10% in the number of people choosing advice work as a career.

In considering whether the project met each of these formal outcomes, the following findings from the evaluation evidence are key:

- The project made a strong contribution to increasing the capacity of the advice sector to help more people to get the advice they need. Fifty four per cent of survey respondents reported an increase in their capacity over the past two years (the operational period for WTfA), with a further 25 per cent reporting that their capacity was unchanged over this time.

- A majority of advice agencies reported that more (36%), or the same (46%) level of support had been available from the partner organisations over the last two years, with only a minority (11%) reporting less support available. Because much of the support provided by the partner organisations was enabled through, or delivered as part of the WTfA project, we can consider that part of the increase in capacity reported by advice agencies is due to WTfA, even though the advice agencies may not have recognised this.
- The great majority of advice agencies (85%), from all networks and all regions, have seen increases in the number of clients seeking advice for the first time. Most of this is due to the effects of the recession, but some is attributed to improvements in the capacity of advice agencies to promote services to potential clients. The increase in demand for services is reported as ranging from 12 per cent to 100 per cent. Most advice agencies have been able to meet this increase in demand for their services, with the result that many more people have been receiving advice.
- The project has helped to increase the availability of discrimination advice, both directly through training advisers to deal with discrimination cases and indirectly by influencing the Equality and Human Rights Commission to provide additional funding for specialist discrimination training.
- There is no evidence as to whether the project has increased awareness of advice amongst the general public. The project has probably increased awareness of advice amongst MPs through highly successful events which took place at the House of Commons and brought the project partners and some of their advice agency members together with MPs, including Ministers and Shadow Ministers.
- There is insufficient evidence to assess whether the project has been successful in equipping agencies to deliver more effective advice as a result of improved user and stakeholder engagement. There are issues about the timing of activities within this workstream, which left little time for assessing the quality and effectiveness of the toolkit which was developed.
- A majority of advice agencies (63%) reported greater co-operation between advice agencies on service provision in their local area. The WTfA project can take some credit for promoting partnership working, supporting partnership development, and for helping to increase the capacity of agencies to take engage in partnerships. The project may also have helped to develop the culture of partnership working, which was reported to have improved in some parts of the sector in particular.
- There is evidence that more people are choosing advice as a career, but there is no evidence to link this to the WTfA activities. Citizens Advice Bureaux were most likely to report that they are seeing more interest from people choosing advice as a career, and this probably reflects the clear pathway into advice as career which the Citizens Advice services have established.

Has a partnership approach been an effective method of delivery?

The WTfA project was the first joint, major initiative for the six project partners. There have been many positive benefits from partnership working on this project, both for the partners and for the advice sector overall. The key benefit is that the project has brought the partner organisations closer together, giving them greater knowledge and understanding of the work each carries out, and of the expertise from their part of the advice sector.

Some of the project's achievements would not have been possible without the WTfA partnership. Producing the quality mark, for example, owes its successful development and its sector-wide relevance to the partnership approach.

Although there have been clear benefits, partnership working has also presented a major challenge for the project. There was a divide within the partnership about the fundamental purpose of the project; about whether the Big Lottery Funding should be viewed primarily as funding to support shared project activities, or primarily as funding for each partner organisation. There was no consensus on this basic point. This divide has impacted on every aspect of WTfA, from early project planning, through its delivery, and into discussions about any successor projects. The divide has caused tensions within the partnership and frustrations for many involved in the project.

Is the project management structure efficient and effective?

The overall project management structure was an effective one. All the component elements of the structure were necessary for managing a project of this scale. Some aspects of the project management structure worked very well. The project management board was an essential and highly effective element within this structure. ASA as lead partner, and the Project Manager in particular, provided excellent project management.

There are areas in which the project management structure could have been improved. Having fewer workstreams would have reduced the number of workstream management boards, thereby simplifying the project management structure, reducing the time input required from project partners, and increasing the links between different areas of project activity.

There were weaknesses in the strategic leadership and strategic management of the project at all levels. There was very little strategic co-ordination between the different workstreams. Few of the workstream management boards took a strategic approach to their role; most focused on delivery management. There was no clear link between the workstream management boards and the project reference group, leaving a gap in the project structure in terms of continuing strategic review of the workstream delivery activities, what lessons were emerging from these, and how the project partners could build on and develop these. Finally, the project reference group did not provide the strategic leadership role which the project required.

Has the project delivered good value for money?

There is no clear basis for making value for money judgements about the WTfA project, as there are no projects operating on a similar scale within the advice sector on which to base any comparisons.

It seems likely that better value for money could have been achieved in the project's management and administration by reducing the number of workstreams.

In terms of value for money from each workstream, some very cautious assessments can be made on the basis of the available information on the benefits to advice agencies and impacts in the advice sector of each workstream. Broad comparisons of the relative budget allocation to each workstream against its benefits and impacts suggest that very good value for money has been achieved through the Quality and Outcomes workstreams. The Discrimination, Promoting Advice and the User and Stakeholder workstreams have also provided good value for money. These assessments do not in any way reflect the quality of the management or staffing of the workstreams.

It is impossible to know whether working in partnership has been a cost effective approach compared with working independently to deliver the same activities and outputs. However it does seem likely that for those elements of the WTfA project where much of the delivery activity has been carried out relatively independently by each partner, such as the training activities in the Workforce Development and Training workstream, better value for money would have been achieved outside of the WTfA framework.

Priorities for future support

For advice agencies, the top priority for future support from partner organisations, or through projects like WTfA, is for help with funding. This includes identifying funding sources, centrally coordinated fundraising, advice on diversifying funding sources, advice on income generation, support with preparing tenders, and developing models for reducing advice agencies' reliance on public funding.

Conclusions

The WTfA project has been very successful in delivering many useful services to advice agencies, creating valuable products and resources for the advice sector, and demonstrating that the sector's main infrastructure bodies can work in partnership for the benefit of the overall sector.

Much of the success of WTfA must be credited to ASA which has provided excellent project management, ensuring that this complex project was delivered efficiently, to timetable and within budget.

Some of the work which has taken place through the WTfA project has been excellent. The Quality workstream has demonstrated excellence in partnership

working and in the quality and value of the product which has been developed. The Outcomes and Discrimination workstreams have also developed and delivered excellent products and services which have been highly praised by internal and external stakeholders.

There has been a far clearer focus within the project on meeting milestones than on achieving outcomes. This reflects the strengths of the project's management structures. It also points to some weaknesses in the strategic leadership of the project.

The project has brought a range of benefits to frontline advice agencies, including training, information resources, and support to pilot new approaches. There have been tangible benefits for at least 500 advice agencies, and some benefits for all 1,700 advice agencies in England, within the project lifetime. The benefits for advice agencies will continue long after the project has ended, through the continued availability of resources which the WTfA project developed.

The sustainability of the benefits for frontline agencies is uncertain. An overwhelming majority of advice agencies (78%) reported that advice services have become less sustainable over the last two years. Reductions in public funding, increasing competition for contracts, shorter contract periods; these factors are threatening the sustainability of many advice agencies. Advice agency interviewees were unanimously bleak about the prospects for advice services from April 2011, with most expecting to undergo funding cuts and many unsure of their continued survival.

Not all of the project's formal outcomes have lent themselves to evaluation, as several included targets for which no baseline measurements were available, or for which the task of measuring change was beyond the scope of the resources available. On the basis of the elements of the formal outcomes which we have been able to evaluate, we conclude that all five outcomes have been met to some degree.

A systematic approach to evaluation was not built into the project from the outset, with the result that evaluation activities have taken place across the project in an uneven and uncoordinated way. If a single, or more co-ordinated approach to evaluation had been taken from the outset, it is possible that more advice agencies would have contributed, for example by completing survey questionnaires. This may have increased response rates and the reliability of all the evaluation findings and would have represented a more cost effective approach.

Lessons learned for future partnership working

1. Future partnership projects should aim for a shared commitment from all partners to achieving common objectives and outcomes. Identifying shared objectives should be the starting point for partnership working and, once agreed, these common goals should guide every stage of project planning, management and implementation.

2. Target project outcomes should be precisely defined and should be measurable on a scale that is commensurate with the resources available for this task.
3. Evaluation should be planned from the outset. An evaluation framework should be developed at the project planning stage, before delivery commences. It should not be necessary for different sets of evaluation activity to take place independently within the same project, but if this does happen then close co-ordination is essential.
4. The methods for capturing information about the benefits and impacts of projects should be considered as part of the project planning process and put in place before project delivery begins. This enables baseline data to be collected where necessary and helps to ensure that monitoring and reporting requirements from the project workstreams are comprehensive. It also integrates evaluation with objective and outcome planning, ensuring that there are mechanisms for continuously learning from the project and reviewing how this learning could be used to improve project delivery and outcomes.
5. The skills and abilities of project managers are an essential element in whether projects are successful or not. Complicated projects with difficult partnership issues require excellent project management skills to ensure successful delivery.
6. Partnership projects require a high degree of clarity and transparency about what each partner receives and contributes. This allows for clearer accountability within projects, and helps to avoid any tensions around whether partners are fairly delivering 'their share' of project activities.
7. Any future project of this type should look closely at how to encourage a stronger strategic leadership role both at the core of the project and within its individual workstreams. A link between these two levels is important, ensuring that the lessons learned from delivery activities are fed into the strategic body at the project centre and that the strategy body can make decisions about how the delivery activities should be developed to maximise strategic benefits from the project.
8. A future WTfA type project should aim for fewer workstreams.
9. At the project planning stage, the completion of new products or services should be scheduled for as early in the project period as possible, to leave sufficient time for testing, review and roll out of the final product.
10. For large scale, complex, multi-partner projects, an independent governance board is essential. This body is required to make objective decisions in the best interests of the project's agreed objectives and outcomes, which are impartial and removed from any vested interests of the project partners.