

## **How to use the tools**

### **Introduction**

The purpose of this document is to provide a simple guide to how you could use the Age UK Advice Outcomes Resource tools in your Age UK or Age Concern I&A service. The guide considers the use of the tools both in regard to different types of advice provision and levels of staff resource.

More detailed information about the Age UK approach to advice outcomes can be found in Section 8 of the guidance: 'The Age UK advice outcomes approach – an overview'. Details of each of the tools and how to use them can be found in the sections of the guidance devoted to each of the individual tools.

### **Brief description of the tools**

In order to better understand the information in this document the following provides a brief description of each of the tools in the Age UK Advice Outcomes Resource.

### **The practical gains tool**

This tool is a spreadsheet in which an adviser or administrative worker records the practical gains (the tangible benefits of advice, e.g. additional money, reduced debt, receipt of services, etc.) achieved for individual clients. The tool will produce monthly, annual and year-to-date reports on all the practical gains achieved by your I&A service for enquiries relating to money and benefits, housing, community and health care, and services and consumer issues. The tools were primarily designed for Age UK or Age Concern I&A services that provide face-to-face advice, but they can also be used for by Age UKs or Age Concerns that provide telephone advice.

### **The questionnaires**

The questionnaires are designed to gather more detailed, rich information on how successful your I&A service is at solving clients' problems, the practical and consequential gains achieved for your clients and your clients' views on the appropriateness and quality of the service they received. The questionnaires are to be used with a small number of clients that have received face to face advice, probably two or three a month. The questionnaire should be used as the basis of an interview with the client, most likely conducted over the telephone. Also included is a spreadsheet into which the data from the questionnaires can be entered that will produce service management information. There are three questionnaires in total: a general questionnaire and then two variations of it, one for clients that are referred onto other advice providers and the other relating to support brokerage.

## **The case study guidance**

The guidance is designed to help your I&A service, once you have completed the questionnaires, to develop various types of case studies and client testimonials from them.

## **Triangulation and alternative methods**

This section of the resource includes two short questionnaires that can be used to validate the results of the longer questionnaires. One is a very short two-question questionnaire that can be used by telephone or post, or by embedding into existing diagnosis and follow-up/case-closure procedures. The other is a short postal questionnaire. These questionnaires could also be used by your Age UK or Age Concern if you feel that using the main questionnaires maybe too resource-intensive.

## **Types of I&A service**

The following section considers how each of the tools could be used by different types of Age UK or Age Concern I&A service.

### **Information and signposting service only**

None of the tools is really appropriate for services that only provide information and signposting. They are designed for use with clients who have received advice. It is debatable whether you can actually measure the types of client outcomes that this resource is concerned with for information and signposting services.

### **Telephone advice line only**

While the resource is of most use for capturing information on clients that have received face-to-face advice, there are elements that could be used by telephone advice services:

- The questionnaires would not be appropriate.
- If your service contacts clients to find out what actions they have taken after receiving advice, the practical gains tool would be useful. It is expected that using the tool would not noticeably increase the time taken to conduct and record client follow-ups.
- If your service does not conduct follow-up calls with clients, any results recorded on the practical gains tool would only be assumptions about the action taken by the client and would therefore not really be advice outcomes. However the tool does allow you to capture information on estimated financial gains identified (e.g. eligible welfare benefits, values of various grants, etc.) that you may find it useful to record. And it also allows you to record when a client has received appropriate information or advice on an issue.

- We would recommend that you sample a selection of your services clients via the post using either of the short questionnaires in Section 6, 'Triangulation and alternative outcome-gathering methods'. You should look to sample 50 per cent of your clients over a four-week period and we would recommend that you do this every six months. It would probably take about two full days of admin time to send out and then analyse the results, dependent upon the number of clients you deal with. If your service deals with 3,000 callers a year this would equate to sampling approximately 115 clients each time. You can probably expect about a 50 per cent return rate. Based on these figures, it would cost approximately £80 in postage and stationery to conduct the survey (this figure assumes that you have included a prepaid envelope with each survey).

### **Face-to-face advice**

All tools are applicable to face-to-face advice services but the very best results (e.g. volume of relevant information gathered, legitimacy for claiming the advice outcomes) will come from using the tools with clients who have received casework. The following considers how the tools could be used by face to face advice services of differing sizes.

#### **Smaller Age UK/Age Concern I&A Services (two or three staff)**

- If staff resources allow, all clients receiving face-to-face advice should be followed up by telephone to check that their problem has been resolved and to identify the nature of any practical gain achieved. As a minimum, this practice should take place with all clients receiving ongoing case work, as it can easily be incorporated into the process of providing case work advice. It is expected that inputting the data into the practical gains tool would not noticeably increase the time taken to conduct and record client follow-ups.
- It is recommended that the Age UK/Age Concern conduct two advice outcome interviews each month by telephone, using the questionnaires supplied in Section 4. Ideally, the interviews should be conducted by the service manager (if the service manager has I&A knowledge and experience). Alternatively, an I&A volunteer could conduct the interviews, or possibly staff members could interview a client each. They should not interview their own clients, and you should be mindful that staff can feel uncomfortable with the process. Conducting both interviews and recording the results should take no longer than half a day.
- Every six months or so it would be worthwhile looking through the records of the interviews conducted to identify and produce one or two case studies and a few short client testimonials. This should take no more than a couple of hours.

- For a small Age UK/Age Concern it may be too much of a strain on resources to conduct further small surveys to triangulate your results, but you may wish to consider adding the two short questions from the 'Pre and post short questionnaire' (from section 6 of the guidance on triangulation) into your advice diagnosis and client follow-up processes. The additional time added to both processes is negligible. It would take 30–45 minutes each month to collate the results and by doing so you will be able to test whether the types of results you are getting from the questionnaires are reflected across the majority of your clients.

### **Larger Age UK/Age Concern I&A Services (four or more staff)**

- If staff resources allow all clients receiving face-to-face advice should be followed up by telephone to check that their problem has been resolved and identify the nature of any practical gain achieved. As a minimum, this practice should take place with all clients receiving ongoing case work, as it can easily be incorporated into the process of providing case work advice. It is expected that inputting the data into the practical gains tool would not noticeably increase the time taken to conduct and record client follow-ups.
- It would be recommended that the Age UK/Age Concern conduct two or three advice outcome interviews each month by telephone, using the questionnaires supplied in Section 4. Ideally, the interviews would be conducted by the service manager (if the service manager has I&A knowledge and experience). Alternatively, an I&A volunteer could conduct the interviews, or possibly staff members could interview a client each. They should not interview their own clients and you should be mindful that staff can feel uncomfortable with the process. Conducting the interviews and recording the results should take between three and five hours.
- Every few months it would be worthwhile looking through the records of the interviews to identify and produce one or two case studies and a few short client testimonials. This should take no more than a couple of hours.
- To triangulate your results you could consider adding the two short questions from the 'Pre and post short questionnaire' (from section 6 of the guidance on triangulation) into your advice diagnosis and client follow-up processes. The additional time added to both processes is negligible. It would take 45–60 minutes each month to collate the results.
- You should also consider using the other short survey, included in Section 6, 'Triangulation and alternative outcome-gathering methods', by post with a small sample of maybe 100 or so clients on a yearly

basis. It would take approximately one or two days of admin time to send out and then record the survey results. You can probably expect about a 50 per cent return rate. Based on these figures, it would cost approximately £70 in postage and stationery to conduct the survey (this figure assumes that you have included a prepaid envelope with each survey).