

# **RAN Advice Forum Report**

## **“Delivering advice from home, online and by phone - advantages, disadvantages and issues”**

**February 10, 2021 - by Zoom video link**

### **Introduction**

1 This was our second Zoom Forum. Its aim was to give participants a chance to share two things:

- their views of the advantages and disadvantages of delivering advice from home since the start of the pandemic last March; and
- their emerging thinking about the sort of balance they would want to strike between office and home working, and between face-to-face, phone and online service delivery, once the pandemic was over

2 We had 20 participants from a wide variety of different organisations, including one participant linking in from London, and another from Devon. The Zoom links were problematic, and delayed the start of the Forum, but were eventually sorted out.

3 After a short introduction by Richard Harrison, RAN Chair, there were two presentations:

- Matt Harrison (CEO) spoke about the Reading Community Welfare Rights Unit
- Tina Stevenson (CEO) spoke about Citizens Advice Reading

The slides they used are attached to this report.

4 We then had a group discussion focused around the two themes set out above.

### **Reading Community Welfare Rights Unit - Matt Harrison**

5 The Reading Community Welfare Rights Unit is based in Whitley and provides specialist advice on welfare benefits, together with support with mandatory reconsiderations, appeals and preparation for tribunals. A high proportion of the people who come to it for help have complex needs.

6 The key points from Matt's talk were as follows:

- It had been very challenging advising their clients remotely from home. Many were vulnerable, some were digitally excluded, others had learning difficulties, or lacked the confidence to phone for help. Moreover the process was difficult - it was very time consuming, and it was much harder to judge whether the client understood or was happy

with the advice he or she had been given. So this was definitely not their preferred way of working

- Their staff had also found remote working difficult in other ways. They felt isolated, they missed the everyday interaction with colleagues, and the emotional impact of some of the cases they were dealing with was harder to cope with, putting strains on their mental health. Meeting by Zoom was better than nothing, but not as good as face-to-face, and there were periodic problems with the technology.
- But there were advantages, both to the individual and the Unit, in working from home. Members of staff could choose when they worked, within core hours, had a working environment that was more comfortable and potentially more productive, with fewer distractions, and they avoided the costs and stress of travel to work. The Unit would be able to retain one staff member who was moving to Surrey but would still be able to provide advice online or by phone.
- So once the pandemic was over, he would be looking to develop a blended approach, with a mixture of home, office and outreach working, which would meet the needs of their clients. This would also give staff choice about when and where they worked, as long as core hours were covered - recognising that individual members of staff were differently motivated and flourished best in different settings.

### **Citizens Advice Reading - Tina Stevenson**

7 Citizens Advice Reading (CAR) provides comprehensive generalist advice to help people with a wide range of problems, including benefits, employment, debt and money, consumer, relationships, housing, discrimination, law and rights, healthcare and education. It also provides specialist help on employment, housing, immigration and debt.

8 The key points from Tina's talk were as follows:

- When the first lockdown arrived one immediate problem was technology - kitting out and training 80 advisers so they could work from home. Equipment had to be bought in batches, so there were compatibility issues, and broadband coverage wasn't always adequate. But these problems were resolved, and CAR now has much of the technological capability it will need for the future
- Another immediate concern was client access to advice, for those who were digitally excluded or needed to be seen face-to-face. That remains an issue, but one early innovation was an online enquiry form, prominently positioned on the CAR website, which has proved popular and effective. More older teenagers and young adults have been contacting them for advice, groups they had previously struggled to reach
- Staff and volunteers have found giving advice from home challenging. Some clients are angry about the problems they face and the difficulties they've experienced getting help, and this can be hard to deal with, particularly if advisers live alone. There aren't many 'quick wins' - most

clients bring complex problems, so the pressures are intense and unremitting. And everyone misses the office interaction. But advisers have learnt new ways of working and have valued the convenience of being able to work from home.

- Providing support to staff and volunteers, and ensuring the quality of their work remained high, have been real challenges. But CAR developed new processes, quality has been sustained, and training and development has continued. The management team has worked hard to keep everyone engaged, even volunteers who have been unable to work from home, and have sought regular feedback so they can improve communications. Recruitment has been easier, because where candidates live is less of an issue, and law students can fit online volunteering more easily into their academic commitments.
- National Citizens Advice has provided local offices with some additional funding, particularly for IT equipment to sustain capacity for service delivery, but has continued to expect pretty much 'business as usual' in terms of meeting targets for the volume and quality of advice delivered, and that has been a significant challenge.
- Looking ahead to the end of the pandemic, it is clear that CAR won't go back to the 'old normal'. The 'new normal' will consolidate and build on the learning and successes of the last few months, but exactly what it will look like is at this point too hard to predict - the world still has too many 'moving parts'.

## Group discussion

9 We began by discussing the pros and cons of trying to deliver services from home. The main **disadvantages** cited were as follows:

- It had been especially difficult to provide effective support to some client groups - such as people with sight loss, Alzheimer's, learning disabilities, minimal English, low capability, or who were not safe phoning from home. And as a result, some organisations had lost touch with a number of their existing clients
- The parallel reduction in the scale and effectiveness of some statutory services, who were also trying to operate remotely, was generating a significant level of unmet need. This had widely varying effects on participant organisations. On one hand, the reduction in NHS diagnostic services had reduced the flow of new Alzheimer's clients. On the other, the reduction in social care and police welfare visits had left individuals with learning disabilities and their families in absolutely dire straits if their main carer was hospitalised with Covid or another serious illness. There was a level of acute need here that Reading Mencap's staff and volunteers were struggling to meet remotely.
- The emotional pressures on staff to deliver were greater - particularly the intense pull to try and help clients in real need by meeting face-to-face, despite the dangers involved - and these were harder for managers to resolve remotely and ensure everyone remained safe.

Very occasionally managers had sanctioned home visits, under strict conditions, to clients in particularly acute need.

- Volunteers who were unable to work from home had lost confidence and had been hard to keep engaged with the organisation.

10 But there were some compensating **advantages**:

- It had been possible to begin to break the cycle of dependency of some of the regular clients - the 'frequent flyers'. They had had to do more for themselves, and that had made them realise they could be more self-sufficient
- In some cases It had exposed assumptions organisations had previously made. It had become clear that some clients engaged better by phone than face-to-face, and that clients did not all need the same level of support. This had improved the quality and cost-effectiveness of services
- It had sharply accelerated the move, that was already underway, towards digital and remote working
- It had stimulated innovation in service provision - RAB Sightloss had secured funding which had enabled it to provide some clients with mail-reading machines, which made them more independent; Reading Community Learning Centre had developed extensive 1 - 1 support to replace the classes they had previously run; Tuvida had created several new services for carers; and the Alzheimer's Society was developing a new dementia strategy
- Some client groups had become keener to use the services their organisations were able to provide - ACRE had seen a sharp increase in the numbers attending their community engagement activities
- Working across large distances had become much simpler. This had helped recruitment and retention. Organisations with a regional structure had found it easier to share knowledge and ideas between centres and provide services to wider audiences.

11 We concluded by thinking about what a '**new normal**' might look like - balancing home and office working, and face-to-face, phone and online services. The key points emerging were as follows:

- Participants were not expecting the 'new normal' to crystallise any time soon. The growing coverage of vaccinations would probably allow some face-to-face services to resume, with face masks and social distancing, but the experience of organisations like Launchpad, who had managed to keep their offices open throughout the pandemic, showed this might not be straightforward. Staff were likely to be very anxious about returning to work in their offices. Launchpad had operated a two-team system, with no interaction between the teams, but one positive test within a team had put the whole team out of action for several days. Some organisations would find it hard to read clients' emotions through face masks, and others would struggle to maintain social distancing in the buildings they had to use.

- A key challenge would be deciding how best to manage the increased demand organisations expect to encounter, while at the same time enabling staff and volunteers to find their preferred blend of office and home working. That could involve reducing 'drop in' times, more complex attendance rotas, and face-to-face, phone and online services all playing a significant role.
- Several organisations were expecting to continue to hold staff and volunteer meetings by videolink, because of the savings in time and other costs these offered, while others were planning to buy new equipment, such as a large screen, so that staff and volunteers in the office and those working from home could come together for meetings.
- Organisations were also planning to rethink the office accommodation they needed. Some offices would not reopen, other organisations would use their buildings for services, not as offices, and others would explore sharing offices. Bracknell and Wokingham Councils were talking about opening surplus accommodation in their offices to voluntary organisations.
- Working across larger distances would continue - to help recruitment and retention, and to make the best use of an organisation's resources. Some organisations were also hoping to work more easily across organisational boundaries, collaborating more closely with partner organisations.

**Richard Harrison**  
**Chair, Reading Advice Network**