

Improving Access to Advice in the Market Towns

The main barrier to providing face to face advice in a range of community locations, such as the various market towns, has historically been the high cost and relative inefficiency of resourcing such provision, compared with more centralised services which benefit from greater flexibility and economies of scale. Dedicating resources such as staff or volunteer time to a single location at a specific time is inherently less flexible, less efficient and more costly than pooling resources in fewer locations where resources can be utilised more effectively to help maximise the numbers of people helped. As funding for advice has been reduced over recent years, this has resulted in a move to provide more telephone based services which can take advantage of the flexibility and economies of scale available by pooling resources while, at the same time, trying to ensure that access to these services continues to be available countywide.

However, while telephone advice is a proven way of helping many people solve a significant range of problems in a cost effective way which is convenient for many, face to face advice is still necessary in some cases. With few central face to face locations, the convenience and cost for clients of accessing face to face advice where this is necessary can become prohibitively expensive. Being able to combine the cost effectiveness of a central pool of advisers with the convenience for clients of more community based locations would solve many of the problems inherent with the traditional outreach model.

This proposal aims to provide the outline of virtual face to face model which takes advantage of the recent developments in super-fast internet access to broaden access to the equivalent of face to face advice in more locations while still maximising efficiency through economies of scale.

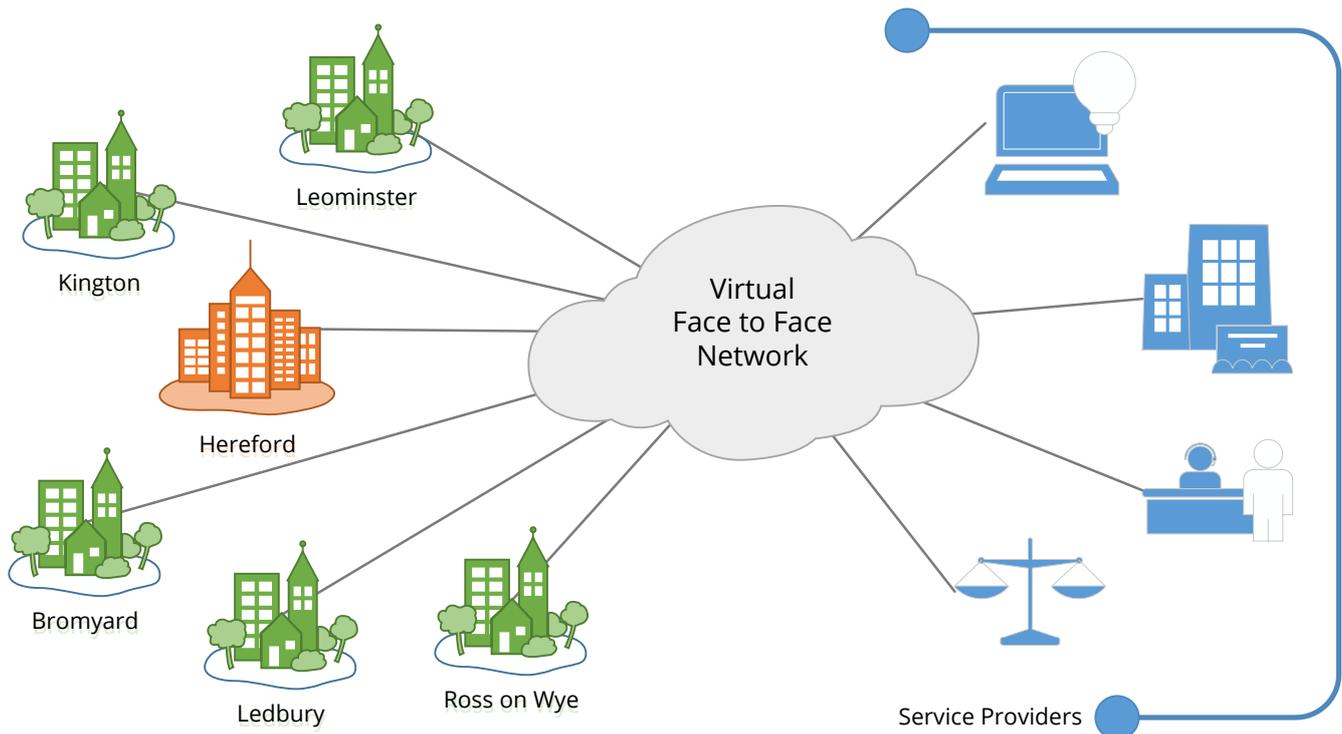
As developing such a framework would take not only significant investment but also a not-insignificant period of time, an interim hybrid model is also proposed which would increase access to face to face advice for residents outside Hereford city in the short term. By using the recent expansion in telephone advice capacity to maximise the effectiveness of the traditional outreach model, some face to face advice could be brought to the market towns for clients where this is the best way of resolving their problems.



A Digital Vision for the Future

To overcome the downsides of traditional outreach services and provide more regular and convenient access to face to face advice for clients, we would like to develop a virtual face to face service providing access to information and advice, along with other services, via video conferencing.

Working alongside telephone based advice for clients who prefer this method, several virtual face to face locations, initially based in the market towns would be developed. These locations would be equipped with a user friendly IT system which would enable users to contact both Citizens Advice to help with their legal or advice problems and with other partner organisations providing other services where face to face access is beneficial.



To manage demand, bookings would need to be taken in advance and given the different time demands from partners, each individual service would likely need to be delivered on a rota basis, spread across the different community locations to ensure that all locations could be adequately services.

Users would be supported on site by volunteers who would have generic training to help users access the various services and manage bookings and timing of sessions. These volunteers would not be responsible for providing any of the partner's services, but would be sufficiently informed about each service to be able to direct people to the most appropriate service for their stated needs.

Advantages

Using a virtual face to face channel for advice has a number of advantages compared to traditional face to face outreach services:

- **More frequent access for clients.** As advisers no longer have to travel to remote locations, access at each community venue could be provided on a more regular basis, possibly even daily depending on the number of locations and available resources.

- **More cost effective and efficient.** Advisers could be located in one place maximising flexibility and would not have to travel, eliminating the travel costs and time associated with face to face advice. Advisers would also have better and easier access to the support and resources needed to deliver good quality and effective advice.
- **More scalable.** Additional community venues could be more easily added to the network, possibly allowing virtual face to face services to be brought to even more, smaller community locations.

Development of the Virtual Face to Face Network

To develop and introduce a digital based face to face advice model for Herefordshire would not be practically or financially viable for one organisation, such as Citizens Advice, to implement alone. The investment in technical infrastructure just to provide the legal information and advice would be prohibitively costly and a single organisation would be unlikely to be able to resource not only the services provided through the digital network but also the additional resources needed to support users in community venues to access the systems.

However, the principal of providing virtual face to face access is not exclusive to the provision of advice services. Other organisations offering a range of different services and facing the same challenges of providing services to a large rural county might also be able to integrate a virtual face to face channel to broaden access to their services.

Therefore, it would make sense to seek additional partners in development of a virtual face to face network and co-design the system around a set of collective requirements. This would obviously take some time and would require additional investment but this has the potential to attract additional funding if sufficient support in the model can be demonstrated. With its extensive experience of public facing services and volunteer recruitment/training, Citizens Advice is ideally placed to lead on the co-ordination and development of this work in partnership with the Market Towns Forum.

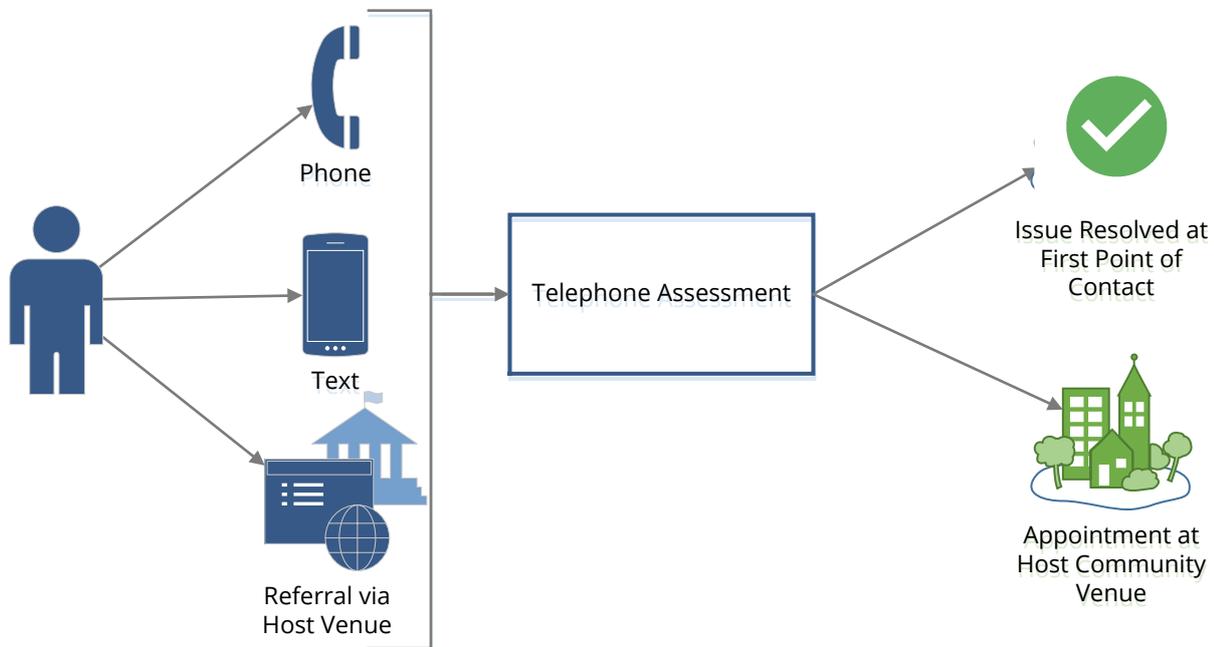
Further Potential

Dependent on demand and success of a virtual face to face network, there may be the potential to take the model a step further. In addition to fixed virtual face to face venues in large population centres, it is conceivable that where superfast internet access is available in smaller community venues could be expanded to provide pop-up virtual face to face outreaches, say on a rota basis, in other community venues.

A single volunteer with generic training in helping client access the network could then enable people in smaller community venues to access a number of different specialised services which would otherwise find making such journeys prohibitively expensive and inefficient.

Interim Arrangements

In order to increase access to face to face advice in the shorter term, the traditional outreach model (where advisers travel to host community locations to provide advice) could be combined with the current telephone and email service offered to the whole of Herefordshire. While this is less cost-effective than the proposed digital model it can be delivered much more quickly, possibly within a matter of weeks.



The majority of potential clients would continue to have an initial discussion with an adviser by telephone (either via calling in or requesting a call-back from an adviser) with the aim of resolving the client's problem at the first point of contact by providing information or one-off pieces of advice. Where face to face generalist advice is needed and preferred by clients, an appointment could be made for the client at the closest market town location where advisers would visit at least once every two weeks, but possibly more frequently depending on demand and availability of resources.

Compared with the traditional outreach model, where clients would only receive advice at the face to face appointment, the advantages for clients of having an initial telephone assessment in this way is:

- **More frequent access to information and advice.** Instead of having to wait up to two weeks or more for an appointment, clients would be able to have an initial assessment three days a week. This allows any potential emergencies to be identified and responded to as early as possible.
- **More convenience.** Clients are able to access advice at a greater range of times, which can fit into their lives better. Additionally, if their query is a simple one, it may be possible to resolve during the initial telephone call, rather than the client having to make time specifically to attend an appointment some time away.
- **Better preparation for appointments.** Where an advice appointment is made as part of an initial assessment, clients can be adequately prepared for their appointment. They will know what documents to bring with them, what additional information the adviser might need and what they need to do to make the best of their appointment. This can reduce the need for repeat appointments and thereby maximise the number of clients assisted.

- **Quicker access to specialist services.** If, during an initial assessment, it's determined that specialist advice might be more appropriate (e.g. specialist debt advice or benefits advice for cancer patients) referrals can be made to these services at a much earlier stage.

Required Resources

To provide face to face advice under this model, certain resources would be needed at the host community venues. Ideally, to provide an effective and efficient service it would be necessary to have:

- Private interview space for at least two advisers during each session, accessible for disabled clients
- Broadband internet access, preferably via WiFi, which advisers can connect to
- A suitable indoor waiting space, with seating, for 3-4 people (as some client attend appointment accompanied by people supporting them)

Additionally, it would also be helpful to have access to a landline telephone which is capable of making outgoing calls (charges could be reimbursed, if necessary, based on itemised bills).

Monitoring and Reporting

With a view to informing the development of the digital model, specific monitoring would be undertaken with clients from the market towns with a view to establishing:

- Demand for face to face advice in community locations as, until now, it's not been possible to assess client *preference* for advice channels.
- Suitability of digital advice to the range of enquiries, such as the need for advisers to consult client paperwork which would be more difficult via a digital face to face session.
- Digital skills and preferences of clients, to assess the range of additional support which might be needed at community locations for clients to access digital services.

In addition to this specific research, normal reports would be provided quarterly covering such aspects as client numbers, enquiry types, advice issues and outcomes/impact.

Publicity

To ensure that residents in the various market towns are aware of the new service various publicity activities would be undertaken including: (joint) press releases, joint-branded posters and leaflets advertising access to the new services, adverts in suitable parish magazines/publications and publicity of outreach services via both local and national Citizens Advice websites.

Additionally, if desired, the host community venues could be provided with access to a secure referral portal so that they can request initial assessments for clients who aren't able to call/text in themselves.