Developing Business Skills for Community Connecting Services in the Third Sector

Evaluation Report

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Introduction

This evaluation report summarises the progress of the project against its objectives, highlights those factors that helped and those factors that hindered the development of community connecting services at the participating sites, and makes recommendations about future business support for small third sector organisations providing community connecting services. A complementary DVD is currently being prepared featuring personnel from the participating organisations talking about their experiences of being involved with the project[1].

The overall aim of the project was the development of a business model for sustainable community connecting services provided by small third sector organisations. This was to be done by assisting six organisations or individuals to establish a community connecting service, by instilling sound business skills and practices in the development of those services, and by supporting commissioners and care managers to work with providers to diversify local social care markets. Specific questions relating to the evaluation flowed from the aims and objectives of the project:

1. What support was required to establish a community connecting service how effective was the support that was delivered through the project?
2. What were the needs of commissioners and care managers and how were they met?
3. How appropriate was peer mentoring and service replication as a means of developing market capacity?
4. How sustainable were the services established?
5. What was the impact of the services developed upon local stakeholders (service users, service providers, commissioners)?
6. What lessons could be learned to inform support for community connecting beyond the end of the project?

How the evaluation was carried out

Information for the evaluation has been gathered on a regular basis throughout the project. Each site was visited prior to joining the project to explore the background and motivations of the organisation. Film and audio recordings have been made of key participants at each site who have been able to comment upon business developments and the support provided by the project – these have included connectors, service users, care support staff, managers, commissioners and care managers. Information was also collected at network events from potential participants and follow-up interviews were conducted either in person or by phone with people and organisations that chose not to join the project. Discussions have been held with members of the project team and the advisory group at various points throughout the project.

Recruiting sites

The project aimed to recruit over a three year period six small organisations from the third sector to take part in the project by setting a community connecting service. Recruitment was carried out through open and targeted invitation. During the course of the project more than thirty

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[1] Some comments from participants about the value of the support they have received from the project may be found in an appendix to this report.

organisations or individuals were either approached by or approached the project to discuss joining the project. The target of six was achieved although problems were experienced in the early years because of the withdrawal of one of the intended mentor organisations following a merger with a much larger care provider. This was a significant blow since the organisation was at an advanced state of readiness for the project by virtue of its involvement in the *Life in the Community* action research that preceded it.

The organisations subsequently recruited to the project were:

- *Grapevine* is the provider of a range of advocacy, planning and support services to young people and adults with learning disabilities in Coventry and North Warwickshire. It was the first site to be recruited having been part of *Life in the Community*. *Grapevine* acted as the main mentor to the other project participants and has contributed to the further development of the philosophy and practice about community connecting over the three year period of the project. Specific help was sought with financial modelling for its Connecting People service and negotiating relationships with local commissioners.

- *Delos Community* is an established provider of day services in Northamptonshire and joined the project in 2009 seeking help with the development of its Community Participation project to complement its existing repertoire of services. Its involvement in the project was supported by local commissioners and the project was asked to provide training and mentoring about community connecting to both *Delos Community* staff and local authority care managers.

- *Out Right* is a project being run by Bournemouth People First, an advocacy organisation run by and for people with learning disabilities in Bournemouth. It helps people make safe friendships in the community through mainstream activities. It builds upon Bournemouth People First's long-standing involvement in 'keep safe' training and support. *Out Right* has received a grant from the Big Lottery Fund to assist its start-up and sought support from the project through mentoring in good community connecting practice from Grapevine and in developing a model for future funding of the service.

- *Natural Ability* was established 2 years ago by the mother of a young man with learning disabilities and her friend in response to the lack of opportunities for people with learning disabilities in rural areas like western Northumberland where Natural Ability is based. Particular help was sought with focusing the business strategy for the company and building a viable financial model.

- *CEDA* is a small day services provider based in Exeter specialising in support for people with high support needs, often with physical disabilities. It approached the project with a request to assist in the development of its enablement service which is part of a strategy to provide more individualised support to access community services and facilities. Specific help was requested around recruiting and supervising community connecting staff and negotiating premium charges for working with people with high support needs.

- *ACP Social Care* is a not-for-profit company established in 2011 to meet a specific need for skilled support for participants in an innovative arts project run by *Outside-In Pathways*. This entailed supporting a group of people with learning disabilities from Bromley to work with the collections

of museums and galleries in central London. The company is run on a part-time basis by a team leader working for Adult Services in the London Borough of Bromley. Help has been sought in dealing with the issues affecting a small start-up company and how to manage and sustain a growth programme.

The sites recruited represent a broad demographic coverage, geographical variation and a range of personal and organisational interests. The project also a contains a mix of starting points: from established providers with structures and resources to develop a new service, yet entrenched attitudes and defensiveness amongst some frontline staff, to organisations rooted in advocacy and start-ups that, according to the findings of *Life In The Community,* are likely to be more amenable to delivering a connecting service. One omission is a service specifically dedicated to community connecting for people from a minority community – an aspiration laid out in the original project proposal. The project team found no demand for this type of separate service, but have been careful to include organisations that provide services to and in minority communities in South East London and Coventry.

A letter of contract setting out the support to be supplied and the expectations of participants in the project was agreed with each of the organisations. Small grants of £2,000 were made to each organisation to be used for either capital costs or to cover time used to set-up a connecting service. Additional payments were made to those organisations acting as mentors to the participating sites – the intention of the original proposal was to create a 'cascade' of support for the creation of new connecting services. Because of the loss of one of the intended mentors, this process has been delayed, but is being pursued through a legacy body currently being established by the project team.

A significant variation to the inclusion criteria for the project was the abandonment of the pre-condition that an 'in-principal' agreement to create a community connecting service between local commissioners and the participating organisation should be in place. This stipulation was intended to build the sort of local cooperation that had been a feature of *Life In The Community*, and provide commissioners with the means to explore diversification of the social care market albeit on a small scale. However, the project team and potential participants became frustrated by the reluctance of some commissioners to either recognise the opportunity or make a commitment to it, causing a drag upon the recruitment schedule in years 1 & 2, especially in the light of the loss of a mentor site. This proved to be learning point from the project; that initiatives like community connecting sometimes need to be 'led from below', demonstrating their value through action rather than waiting for permission from above to proceed.

1. The support required to establish a community connecting service

The project tested out the proposition that small third sector providers require a package of support to develop a community connecting service within a locality. The evaluation explored what forms of support proved useful in establishing a service.

- **Community connecting needs to be promoted and explained.** Much of the early stages of the project was taken up with explaining and clarifying what is meant by community connecting, how it differs from traditional day services and the potential value that it can add to the lives of people with learning disabilities. Resources produced for *Life In The Community* were useful in this respect, especially the *Connecting People* booklet and accompanying DVD. *Grapevine* has

continued to develop the philosophy and practices of community connecting, including strengths-based approaches to support, the role of connecting in prevention and early intervention, redefining hierarchies of needs (to give greater priority to relationship-building and prevention of loneliness) and how to offer connecting as part of a personal budget.

- **Training and mentoring needs varied**. Providers joining the project to expand an existing repertoire of services articulated different needs for training and mentoring compared to the start-up services. The evaluation found that major barriers to achieving change for more traditional day services are the attitudes and working practices of staff and therefore the principal need of a provider like *Delos Community* was training for existing staff to support people in a different way. The start-up businesses were more likely to want practical support and advice about problem-solving and appreciated mentoring that was 'on tap'.

- **Straightforward business advice was highly valued**. Feedback from people making enquiries to the project indicated that the availability of business advice geared to community connecting helped their own decision-making. This led in some cases to groups and individuals abandoning plans to start up a connecting service, in others it has led to a more realistic assessment of the prospects for developing a business. A request for specific help with financial planning and management from five of the six participating organisations perhaps reflects the inexperience of those delivering community connecting, but also uncertainty about pricing their services competitively. The financial planning tool (*Community Connecting Business Template)* was rated highly for ease of use and clarity.

- **More help is required negotiating local commissioning.** Commissioning requirements varied across the six areas. Qualification for inclusion on commissioning frameworks was time-consuming for all the organisations reliant on it as a significant source of funding and was particularly burdensome for the smaller providers. The project struggled to provide detailed support in this area because of the complexity and variability in the arrangements.

2. Meeting the needs of commissioners and care managers

The project was predicated on the notion that commissioners and care managers would have a key role to play in the development of the participating services. The project also anticipated that growth in the use of personal budgets and direct payments would be a significant factor in driving the development of community connecting services. Project resources were therefore devoted to ensure that commissioners and care managers could engage with the participating organisations.

- **The need to transform day services is a motivating factor.** The project was approached by several providers of traditional centred-based day services asking for help to change to a community focus. The motivation for seeking help was invariably changes to local commissioning strategies which were demanding new approaches to day care provision. In a few instances the project was approached by commissioners but this was rare despite widespread promulgation of details about the project.

- **Knowledge about community connecting varied.** The evaluation found a mixed picture of knowledge amongst commissioners and care managers at the participating sites about community connecting and it's potential. Some regarded it as a form of 'brokerage plus' –

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suitable primarily for people with more complex needs for whom standard brokerage is not enough and therefore attracting premium funding to reflect the intensity of support required. Although recognising the potential for delivering cost savings in the medium term by reducing support most commissioner felt that community connecting could not help with the demands upon them to realise savings in the short term.

- **Care managers felt disempowered.** Individual care managers were enthused by the potential of community connecting and appreciated the training where that was offered to them. In general care managers did not feel empowered to promote connecting services to service users and their families because they felt constrained by commissioning frameworks or believed that it was only appropriate for people with higher support needs. Local events helped to raise awareness of the potential for connecting, but partners to the project expressed frustration that potential customers still lacked information or practical experience of alternatives to traditional day time support because community connecting was not being 'sold' by care managers.

- **Use of Personal Budgets to fund community connecting was limited.** Participants to the project reported several factors limiting their access to funding through Personal Budgets. Firstly, eligibility criteria for social care support were tightened over the course of the project. Secondly, personal budgets were rarely offered to, or taken up by, people in the form of a Direct Payment which would give them greater control over the use of the money. Thirdly, they believed that social workers and support brokers felt constrained by commissioning frameworks into working with larger or more established providers. And fourthly, some services such as *Grapevine* were unable to market themselves directly to people with learning disabilities and their families. Participants felt that more needs to be done to encourage flexibility and risk taking in care management and service brokerage so that community connecting is regarded as a viable option.

3. Peer mentoring and service replication to develop community connecting services

The project used peer mentoring as the main tool to develop connecting services in the localities that joined the project and networking to share ideas and solve problems.

- **Peer mentoring was effective**. There was unanimity amongst the project participants that peer mentoring was the best way to learn about community connecting and understand the issues involved in setting up a service. The principal reasons for this were: trust in the mentor as a credible, persuasive and passionate advocate for the approach; the practical advice and problem-solving offered by the mentor; and the adaptability of the model to the participant's own circumstances. The withdrawal of an organisation earmarked for a mentoring role has meant that *Grapevine* and the project team has fulfilled more of this role than originally anticipated.

- **Networking gives confidence**. Participants were similarly enthusiastic about the networking that the project facilitated, through meetings and via the internet. It helped them understand that there were other people who understood and could share their experiences. It also helped

them to forge working partnerships with other participants – as one put it, "to model connecting ourselves".

- **Service replication was not used**. It was anticipated that some new sites would be crated by replicating an existing service in another area. While this has not been deemed appropriate for any of the sites recruited to the project, two individual connectors did consider using *Grapevine* as a host agency to manage and mentor them for an initial period. However these initiatives did not come to fruition.

- **'Cascade mentoring' is planned**. *Bournemouth People First* has a specific brief to develop tools and resources about the role that people with learning disabilities can play in delivering a connecting service. The group will offer mentoring to other self-advocacy groups in the South West as part of the legacy plan for the project.

4. The sustainability of the participating services

It is too early to make definitive statements about the long-term sustainability of the services developed as part of the project, however, all of them continued to operate to the end of the project. Participants were able to identify the factors that are likely to affect their viability in the future.

- **Reductions in social care budgets.** The impact upon small organisations of reductions in public financing. Much of the interest in the project has been generated by the need for localities to transform their day services provision and there appears to be a growing awareness amongst commissioners of the need to develop new and alternative providers. However, small providers fear that their businesses may be unsustainable at the rates offered by local authorities.

- **Experience and support.** Even within the short timescale of the project the newly formed businesses felt greater confidence about their ability to survive the depredations of reducing public funding because of their experience and the availability of good support.

- **Progress on personal budgets.** The slow progress in rolling out personal budgets and perceived restrictive practices in the application of them was regarded as a risk to the viability of community connecting services. Better promotion of Direct Payments and closer monitoring of care management practice in offering Direct Payments could help.

- **Getting the right funding mix.** Four of the six participants relied upon a mix of grant funding, contracts, personal budgets, direct payments and fees for consultancy or work delivered. Finding the right balance of income streams was difficult not simply for the purpose of funding the service, but also for meeting the needs of specific groups. For example, an advantage of grant funding is that it can be used to support people who do not meet FACS criteria. It also allows connecting to be delivered in more flexible ways. Two of the sites are considering how they can develop more permanent relationships with regional grant funders to provide this kind of support. Some sites have also been working with schools; *Grapevine*, for example, sells a planning service to special schools with some connecting added on to provide future customers with a taste of what connecting can achieve for them. The project has stressed the importance of targeting young people with learning disabilities because they are likely to have different

aspirations and different expectations of the support they can receive. It also helps the organisations to get to know the young people well, help them think about their futures and tailor a service to meet those needs. Achieving the right funding mix can also ameliorate problems with cash flow arising from reliance on a single source of funding.

- **Getting the right service mix.** The project encouraged participating organisations to consider their menu of services, in some cases focussing down on what they are good at, in others scaling up or offering a complementary mix of services. Because of its rural location *Natural Ability* saw that there is a limited pool of local adults with learning disabilities likely to require their support. Growth might therefore come from working with other groups – younger people, people with learning disabilities from urban areas seeking working rural holidays, people with dementia and people with mental health problems. A major criticism of traditional day service provision is the revolving door syndrome, whereby service users are offered a range of activities and 'readiness' programme but rarely opportunities to move on. Given the difficulty that some of the more traditional services have experienced in transforming themselves to accommodate community connecting, the project has explored whether 'pathways' can be created through 'arms-length' services or by working in collaboration with smaller niche providers who can provide community connecting as a complementary service to existing centre-based provision.

- **Having a realistic growth plan.** Having considered their income streams and service mix, each of the participants also needed to think about how the service was likely to grow. Many of the enquiries about the project were from individuals looking at the feasibility of establishing a new business. Feedback from those choosing not to pursue this option was that the project team helped them to clarify the potential difficulties of being self-employed and that the lack of income security (including pension rights etc) compared to their current position was the deciding factor. The project also received a number of enquiries from people currently working within day services or allied roles. Combining a current role (within local authority day services) with the development of a new business entailed issues of time, separation of role and potential conflicts of interest. However, the chief benefit was that it provided a guaranteed income during the early period of the set-up. There could also be benefits to the local authority in helping it to find ways to transform its day service and diversify its provider capacity.

5. The impact of the services upon local stakeholders

It was a requirement of the project that participants establish their own mechanisms for measuring the impact of community connecting upon the people using their services and to demonstrate how they use the information to improve their services.

- **There are good stories to tell.** Each of the participating organisations has collected stories about good outcomes for people achieved through community connecting. *Grapevine* makes good use of video to explain purpose and potential of its Connecting Service. However, few of the organisations have used those stories to support their marketing or to influence key decision-makers.

- **Reflection and sharing helps**. The evaluation found an appetite amongst the participants to compare notes about what works and how to make changes to their services. Networking on a

national scale helped them to benchmark their own work in the absence of local comparators. Reflection also revealed a need for quality standards in connecting.

- **There is a need for better monitoring of services**. Participants and commissioners felt there was a need for ways to demonstrate the cost effectiveness of connecting over time and to evidence outcomes. Participants believed that more needed to be done to shift commissioning strategies to recognise a wider set of needs than are currently used to assess eligibility.

6. Lessons for supporting community connecting beyond the end of the project

The project team intend to create a legacy body to coordinate continuing business support to the project participants and to promote community connecting more widely. The project participants have been consulted about these plans and were overwhelmingly supportive. The evaluation suggests that there some areas of support that should be continued:

- Advice for new businesses about the implications of setting up a community connecting service.
- The provision on financial planning support.
- The continued development of good practice in the delivery of community connecting, with particular emphasis on recruitment and management of connecting staff.
- Production of information about community connecting and 'how to' guides for start-ups service
- Opportunities for networking and exchange between connectors.

It also suggests areas for further development work:

- Modelling of service packages to reduce the costs of connecting, for example by sharing connecting support or combining with allied services such as person-centred planning.
- Tools and measures to demonstrate cost effectiveness and outcomes.
- Campaigning with senior social care managers and commissioners to promote the roll out of Personal Budgets and improve the uptake of Direct Payments by people with learning disabilities
- Reviewing current commissioning arrangements to diversify the social care market and address the exclusion of smaller service providers.

Appendix: comments from the participants about the project

"The first meeting we had it was so helpful to have somebody from outside who really understood what we were trying to achieve – just to hear it all and go through everything, thinking how we might go about turning ourselves into a more sustainable business, to be a bit more business-like in our income generation… Having time to do that – not just an hour-long meeting, but to spend the best part of a day – was really helpful. Having that ongoing contact has meant that we've built up a relationship and understanding which is supportive, but challenging as well, asking us have we thought about this and why haven't you done that."

Annie Sanders, Natural Ability

"From you guys, invaluable support. Knowing that there other people out there doing the same sort of thing I'm doing, being introduced to those people. Being able to pick up the phone and speak to either Keith, Molly or yourself "I've got this quandary". Obviously funding is helpful… but, to have all of that information and knowledge available does help a lot."

Alex Jones, ACP Social Care

"That day out in London – even though we very nearly didn't go because times were very hard and we weren't sure if we would be in existence a couple of weeks later – was fantastically valuable from the point of view of feeling we weren't alone and getting support from other people. The contacts we made with other organisations, and one in particular has been fruitful for us in thinking about another aspect of what we do [offering working rural holidays]. I think it will be quite amazing when we get it going!"

Annie Sanders, Natural Ability

"I'd like to really learn about how the other projects are working and particularly how they market themselves, about the skills they give to people and whether we can add that to our training."

Emily, Bournemouth People First

"Being part of the project has kept [community connecting] alive. Its helped us think, how do we fund it, what is the business model? I've had conversations with Keith about there are only so many ways we can reduce the costs – by spreading the connector over more people, or by segmenting the offer so that there is an element of connecting alongside something else. Yeah, that was helpful, definitely."

Clare Wightman, Grapevine

"It helped to sit down and think about Natural Ability as a business… To get credibility from everyone we need to be a business. We've got the ideas, but sometimes financially we don't know how to make them stack up."

Janice Walker, Natural Ability

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