



Improvement

Customer led transformation programme **Case study – Chorley Council**

Meeting the critical needs of older people project

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The Customer Led Transformation Programme

Chorley Council's "Meeting the Critical Needs of Older People" Project has been funded under the Customer Led Transformation programme. The fund aims to embed the use of Customer Insight and Social Media tools and techniques as strategic management capabilities across the public sector family in order to support Place-Based working.

The Customer Led Transformation programme is overseen by the Local Government Delivery Council (supported by the Local Government Association).

The fund was established specifically to support collaborative working between local authorities and their partners focused on using customer insight and social media tools and techniques to improve service outcomes. These approaches offer public services bodies the opportunity to engage customers and gather insight into their preferences and needs, and thereby provide the evidence and intelligence needed to redesign services to be more targeted, effective and efficient.

About Chorley

Chorley is a borough in central Lancashire to the south of Preston. Chorley has a population of 104,100 in 2008, which is estimated to grow to 115,700 by 2020. Chorley is predicted to have one of the biggest increases in over 65s in Lancashire by 2020.

The borough is relatively affluent, but some pockets of deprivation exist. Unemployment is lower than the Lancashire, national and regional averages, but about an eighth of the borough's areas are amongst the most disadvantaged 20 per cent nationally. Seventy-five per cent of residents live in urban areas, and twenty-five per cent live in rural areas.



Background

Chorley has the most rapidly ageing population of any borough in the North West of England with 20.6 per cent of residents estimated to be aged 54 or over by 2020. The 'Meeting the Critical Needs of Older People' project was initiated to address some of the issues highlighted by Chorley Partnership's Health and Equality Strategy 2009 to 2012. The strategy highlights the specific health needs associated with ageing, namely:

- In ten years' time, since a greater percentage of the population will be older than today, approximately 37 per cent more people over 65 will have dementia than at 2009 levels.
- Older people are much more likely to suffer from strokes than younger people. By 2020, it is predicted that 38 per cent more people over 65 will have a long standing health condition caused by a stroke, than at 2009 levels.
- Older people are also much more likely to be admitted to hospital with injuries sustained by accidental falls than the rest of the population. By 2020, 38 per cent more people over 65 will be admitted to hospital through unintentional falls than at 2009 levels.

Through their participation in local networks such as the Older People's Forum, Chorley Council began to suspect that there were older people suffering from fuel poverty in the borough that local services were not yet reaching.

Fuel poverty occurs where households need to spend more than 10 per cent of their income on maintaining a minimum level of heat, and hence is a marker of health and social deprivation. Chorley Council hypothesised that by identifying and addressing these needs through preventive interventions they could reduce the incidence of more costly outcomes such

as hospitalisation or residential care – and thereby reduce the financial cost to the wider public sector.

Help the Aged estimates that nationally nearly three million pensioners in the UK are living in fuel poverty with many forced to choose between heating their home and eating. Several other projects in the North West region had conducted research and analysis into fuel poverty among older people, including Salford in 2005 and Blackpool in 2009, and had concluded that it was not feasible for a single agency to tackle the wide range of factors that contribute to fuel poverty. Therefore this project focussed on taking a holistic approach to both understanding and addressing fuel poverty locally.

Chorley Council became aware they were not reaching all older residents with needs following discussions with their partners at the LSP's Health and Well-being meetings. For example the Fire and Rescue Service raised concerns that they were delivering Home Fire Safety checks to residents who could benefit from other services such as a health check.

Total number of older people in Chorley (based on women over 60, men over 65 (ONS Estimate 2009))	20,700
Total number of people from this group contacting the council during 2009-2010 (based on Chorley CRM data)	9,601
Percentage of older persons in contact with the council	46 per cent
Percentage of all residents in contact with the council 2009-2010	63 per cent

Source: Estimates from ONS and Chorley Council CRM system

Chorley Council also participates in a range of local networks and community groups and, based on interaction with older residents and their representatives at meetings of these groups, they hypothesised that many vulnerable elderly are unaware of available services and sources of financial support, increasing the risk of serious illness and death.

This project built on the previous initiative “Circle of Need®”¹) referred to as CN in this Case Study. CN was led by Chorley Council.

“Part of solving a problem is being aware of it, so the more people that I, in my role as Older People’s Champion can make aware, the better”

Cllr Rosemary Russell, Chorley BC

The CN project developed a depiction of all types of local authority customers and their needs (and the inter-relationships between these needs), through workshops involving experienced front line local authority staff from all types of authority, as well as fire and accident service staff, police, primary care trust and the Chorley citizens’ panel.

CN evolved over three project phases: proof of concept, full architecture of customer need and training materials to support experimentation. This further Circle of Customer Need project is an initial front line implementation of this earlier more theoretical work.

This project has developed the concept of Customer Centric Service Provision and applied it to a local area and the community that it serves. It started with the viewpoint that “fuel poverty’ is a complex issue and therefore would benefit from a ‘systems’ based approach to working with customers. It used and further developed three main tools:

- a knowledge architecture of customer needs
- a front-line interview template
- an area-wide learning process which can be used in an evolutionary way to achieve a radically different approach, based on Customer Centric Service Provision.



¹ Circle of Need is a trademark of Aperia Government Services

Objective

The overarching objective of the project was to understand the causes of fuel poverty in the borough and to reach those people in the area the borough had little or no contact with. To these ends, Chorley Council sought to:

- identify and engage with older people, aged 60+ in order to broaden their understanding of the behaviours and needs of this group in relation to fuel poverty as well as investigating wider related needs, how needs are linked and the opportunities this may present.
- understand the services available to meet these needs, eligibility requirements and potential providers established through engaging with local organisations
- deliver a programme of activity to raise awareness of the issue and increase take-up of relevant services
- develop mechanism to capture insight in the longer term to provide an evidence base to feed into Council and LSP strategy
- influence and enable effective policy and strategy in this area.



Approach

The project took the following series of steps to delivery against these objectives:

- reviewing social demographic data
- drafting and testing a Circle of Need
- conducting workshops with customers
- conducting workshops with partners
- promoting information, advice and support to residents
- developing tools for practitioners.

Socio-demographic data

The project team profiled socio demographic data for the key variables associated with fuel poverty and older people such as age, marital status, type of housing and level of income and from this were able to identify groups and types most at risk from fuel poverty.

The socio-demographic groups identified were based on Experian's Mosaic data.

Socio-demographic group based on mosaic profiles	per cent of households
M57 – Older people in flats subsisting on welfare payments	1.90 per cent
M56 – Older people living on social housing estates with limited budgets	1.87 per cent
M59 – People living in social accommodation designed for older people	1 per cent
O67 – Older tenants on low rise social housing estates where jobs are scarce	1.40 per cent
K49 – Low income older couples long established in former council estates	0.83 per cent
M58 – Less mobile older people requiring a degree of care	0.09 per cent
L54 – Retired people of modest means commonly living in seaside bungalows	1.73 per cent

The groups M57 and M56 occurred most frequently and made up almost 4 per cent of Chorley's population.

The groups were mapped using GIS to build up a visual representation of fuel poverty across the borough using colour coding to indicate level of risk. The maps provided a very effective 'snap shot' of the issue locally and a quick and simple way to identify hot spots and areas that may benefit from targeted activity. The geographic analysis was used in the planning of the outreach exercises later in the project.

Draft circle of need

The project team created a first cut Circle of Need based on their desk research into the three main causes of fuel poverty i.e.

- energy inefficient housing
- low household income
- fuel prices.

This was a fairly quick and simple process, using the base model to identify needs that customers would likely present initially:

- in need of improved accommodation
- having communication issues and barriers to accessing services
- being in need of financial assistance or having problems with debt
- having perceived or actual inability to access rights – people not getting what they're entitled to.

The needs related to each of the presenting needs were then identified which started to build up a holistic picture. This Circle of Need provided a framework for gathering customer anecdotal stories and evidence around their experience of fuel property. The Circle would be refined and enhanced in the light of the feedback gathered.

Customer workshop

The next step was to test the content and assumptions of the draft Circle of Customer Need with customers. To this end, the project held two formal workshops with customer groups across the borough. The location of these workshops was partly informed by the geographical analysis of the Mosaic data – which indicated where those residents most at risk lived – and partly by customer outreach initiatives that partners such as the Older People's forum, Chorley Pensioners, Active Generation were already planning or were underway.

Approximately 50 Chorley residents attended these in-depth workshops, which served three purposes:

- to engage citizens and collect anecdotal evidence of fuel poverty and related needs using structured questions and facilitation techniques
- to establish levels of awareness around the issue and access to services
- to begin to raise resident awareness around the services that were available.

Feedback from these customer workshops is outlined in section 'Findings' below.

Partner workshops

The project team then convened workshops with a range of partners to test and improve their initial Circle of Need. Two workshops were held during early autumn 2010, with the following organisations participating:

- Citizens Advice Bureau
- Lancashire Fire and Rescue Service
- Brothers of Charity
- Help Direct

- Primary Care Trust
- Chorley Community Housing
- Chorley Council Home Improvement Team.

The purpose of these partner workshops was twofold. The first was to match up and map services to the target group's needs, as part of the Circle of Need methodology. The project team worked with partners to verify the assumptions they had made in creating their draft Circle of Need, and to ensure that they had identified all the potential linkages across the public sector.

The second purpose of these workshops was to start to encourage partners to think outside of their individual service focus. The discussions of the customers Circle of Need helped partners to see things from the customer's perspective, and to think beyond their own service offering, and laterally in terms of what services may be relevant and relate to particular customer needs.

The project convened a second-round of workshops aimed at gathering accurate and complete contact information and eligibility criteria from each service to publish in the practitioner tools developed later.

Delivering information, advice and support

Chorley Council were keen that, as well as increasing their knowledge and understanding of the customer group, the project should also deliver some practical outcomes for older people suffering from fuel poverty in time for winter 2010. With this objective, the project uses the findings of the Circle of Customer Need analysis to inform a range of promotional and outreach work during autumn 2010.

Based on customer insight gathered through customer engagement and Circles' of Need analysis of related services, the project team was able to design and deliver a coordinated programme of marketing and promotional activities with their partners under the campaign name, 'Think keeping warmer this winter' campaign. This included:

- co-ordinated communications plan with related services
- developing promotional materials
- in-house surgeries and service delivery days
- rural outreach sessions
- attending relevant partner events
- holding awareness days with local groups.

As part of their 'Think keeping warm this winter' campaign, the project attended and presented at meetings of local groups such as Chorley's Older People's, and also held events on International Older People's Day.

The Chorley Service Catalogue

Consultation with partners revealed that few practitioners were aware of what services were available, and from which agency. In response, the project mapped all the services to specific customer needs, and distributed the catalogue, complete with up-to-date contact details, to 70 local partners. For further information, see 'Outputs'.

Chorley Council also employed their 'Smile' community trailer - a mobile venue to bring the Council out into the community. The 'Smile' trailer supported the project's rural outreach sessions, including a series of event where the mobile venue provided free health checks conducted by healthcare professionals from NHS Central Lancashire. The locations that the 'Smile' trailer visited as part of these rural outreach activities were partly determined by the geographical "hotspot" analysis of the segmentation data which indicated areas with greatest needs.

As well as promoting the range of services provided by the public sector partners, the outreach work and the marketing campaign promoted and facilitated:

- flu vaccinations provided by Central Lancashire NHS
- electric blanket testing in partnership with Lancashire County Council Trading Standards
- fire safety checks and smoke alarm installation, in partnership with Lancashire Fire and Rescue Service.

For further details, see 'Outcomes' below. The outreach work took place between September and November 2010, the project made contact with an estimated 400 older residents.

"The tools for front line use have been specifically designed in a way that we can improve them and feed them back into circle of need, so everything can be improved on a kind of learning loop" **Victoria Witts, Project manager, Chorley BC**

Developing delivery tools for practitioners

Based on the findings from the research and development of the Circle of Customer Needs the project worked with teams from the Home Improvement Agency and housing standards department to co-design a process and some supporting tools to enable frontline staff to apply needs led working at the frontline. The objective was to support frontline practitioners to, effectively and accurately capture and diagnose need and as a result offer the most appropriate service or services to meet that need (based on customer insight). Home Improvement and Housing Standards Teams were selected for the pilot because they had access to customer's homes. Being able to see the visible signs of fuel poverty, such as rotten windows and rising damp was an important part of the diagnosis which enabled the frontline staff to go beyond any 'presenting' problems to the fundamental needs.

Cases are recorded and captured in a Circle of Need format, generating additional insight that can then be used as part of a structured approach to learning over time, informing strategy and improving services. Combined with other critical issues and needs, applying this approach overtime creates a holistic view of the needs of customers, enabling the most effective allocation of public sector resources. The stages in the practical process developed by this project are outlined in more detail below.

Prototyping/implementing the new process

The steps outlined below describe the needs assessment process that the project has developed based on the research, engagement, and analysis through a system of prototyping. By prototyping these frontline tools the project produced a 'proof of concept' set of outputs outlined here. The prototyping process was paper based to allow for refinements and updates.

The process and tools should not require frontline staff to have an in-depth knowledge of Circle of Need and are also re-usable across a range of complex issues.

Following the success of the pilot this process is now being used by Chorley Council's Housing Department, the Home Improvement Agency with Lancashire Fire & Rescue Service's local Community Safety Team for Chorley also using and developing the Service Directory.

Diagnosing needs

On visiting a customer, the case workers review their customer information; they listen actively and get a good understanding of the customers presenting needs, regardless of whether their organisation is the one best placed to help. If the customer has a simple request for an available service to which they are entitled and have no related issues, the staff fast-track the request.

If the customer has complex needs including those indicating fuel poverty, the case workers use their topic template and tick those core needs associated with this topic (see Figures 4 and 5) that are present for this customer. If this is a new customer, they ask them if they are willing for their case to be used anonymously for statistical purposes.

If they are and some new intelligence about the topic has been recognised, they highlight this for later analysis.

Examining related needs

The staff then widen the scope of the conversation to find out if the customer also has any of the related needs shown on the second circle of the topic template (see figure 3 under 'Outputs') and again tick those that are relevant.

Where there are obvious cause and effect relationships between needs these are shown as arrows. Where there are cycles occurring arrows are shown in both directions or a cycle including a number of needs (see figure 1 below).

These forms foster a sense of partnership working with the customer and how some needs can interact with other stakeholder viewpoints, such as the wider community. Staff tick and again draw cause and effect arrows between the related needs and any other stakeholder needs (the outer circle e.g. the environment's need for reduced carbon emissions) which will be affected by meeting the customer's need.

Producing an individual service plan

The case workers access the service directory of local area services for fuel poverty in older people and related needs, by selecting needs. This catalogue has been produced by the project. They identify and recommended possible services with eligibility criteria and contact information.

The understanding of needs developed through the earlier conversation, enables the staff to identify what sort of change would be the most effective for this customers specific circumstances. They discuss what the customer plans to do themselves and discuss service options arriving at an agreed individual plan covering all initiatives for all involved. They also discuss with the customer their concerns for the future, if appropriate, and identify possible future needs e.g. vulnerability to fuel cost increases and possible future solutions for the customer to consider.

Identifying delivery partners

If the customer was ready to go ahead, the member of staff would take responsibility for handing the case over to a nominated delivery team leader to assemble the required package of services and to arrange to have this delivered.

Delivery and learning

The member of staff attending would mark-up the template with the case notes. Conversations with customers sometimes produced ideas for innovation in service design, and when this occurred the member of staff – whether they be from the Housing Department or Fire & Rescue Service – would include these in the customer plan (figure 6) for later analysis. They update the summary topic information (figure 7) with respect to any new initial symptoms of the needs in the template. These summary notes are also feeding a new lower level of the Circles of Need Knowledge Architecture. All information captured would be fed back through to the project team at regular review sessions for analysis of learning, improvement and development of method and tools.



Findings

The desk research, socio-demographic profile, and customer and partner workshops generated substantial findings. The top-line findings are that:

- The people most at risk are those ‘unknown’ to the system – residents who are isolated because of their living conditions. Furthermore, these residents often do not realise there is an issue themselves.
- Compounding this fact is the stigma attached to fuel poverty, which is by definition behind closed doors - making the symptoms less visible
- As the diagrams below illustrate, fuel poverty raises complex issues that customers – not least that of making sense of the public sector. Residents have to understand:
 - the availability and eligibility criteria of services
 - which organisation provides which service (even though practitioners present at the workshops were not aware which services were offered by other partners)
- Given these issues, agencies that make home visits (e.g. Case workers, home fire safety checks, Home Improvement Agency) are best placed to identify the visible signs of fuel poverty like rotten windows, damp patches on walls, use of unconventional heating methods. They must then have an awareness of the wider needs and appropriate services to meet these needs.
- Co-designing solutions with customers can encourage customers to take-up the help and support being offered. For example, an older lady living alone had been burgled several times and was in contact with the Home Improvement Agency to make her property more secure. She also took measures to increase her own security by installing a barking dog alarm at her front door and making a list of security checks.
- Older customers prefer receiving the information face-to-face and word of mouth and generally like something written down that they can refer to.

“It just makes sense to think about any other needs at the same time rather than waiting until it’s a real problem”

Comment from a resident during a Citizen Workshop

“It’s easier for me because I don’t have to try and explain what I mean – they (the outreach/home visit worker) ask the right questions”

Comment from a resident during a Citizen Workshop



The following pages (Findings and Needs) provide a tabular summary of the findings generated by the research and engagement, and give examples of customers presenting and related needs. The primary or 'presenting' needs are grouped under the headers:

- financial assistance: Issues related to low income and cost of fuel
- home improvement: Issues related to the property which may cause it to be energy inefficient/cold
- access to services: Barriers to accessing available services
- advice about entitlement: Issues around awareness and availability of services.

'Related' needs are grouped under the following headers:

- day-to-day support
- medical assistance
- active, supportive community
- home/neighbourhood security and safety.

"Mum doesn't know where to look (for information about Council grants) and if it's hard to find, she wouldn't go to the trouble—this way she is getting what she's entitled to" **Comment from a resident during a Citizen Workshop**

Findings and Needs

Need	Findings	Example customer need	Related needs
<p>Financial Assistance Issues related to low income and cost of fuel.</p>	<ul style="list-style-type: none"> • fuel bills unaffordable and increasing • low income – pension doesn't cover the cost of living • fear of using central heating and resulting high bills • using unconventional heating methods. Examples: <ul style="list-style-type: none"> ◦ older person living in one room because they can't afford to heat the whole property ◦ only turning on the heating an hour before bed time to warm up the house ◦ older couple sitting watching TV in sleeping bags to keep warm • electricity cut off to vulnerable households due to missed payments • older person not on the right energy tariff • customer can't afford to make home improvements to improve home energy efficiency. 	<ul style="list-style-type: none"> • information on how to switch tariffs • sources of financial support – grants/benefits/pension credits • support with debt relief • advice about disconnection • information/tips about more efficient heating methods. 	<ul style="list-style-type: none"> • home improvement – financial support towards cost of home improvements • advice about entitlement – is the customer receiving what they are entitled to? • home/ neighbourhood security and safety • medical assistance – nutrition.

Findings and Needs

Need	Findings	Example customer need	Related needs
<p>Home Improvement Issues related to the property which may cause it to be energy inefficient/cold.</p>	<ul style="list-style-type: none"> • older property in need of maintenance – rotting window frames, no central heating • property under occupied due to family moving on or death of a partner – property unsuitable. • deterioration of neglected rooms that are not being heated • timely home improvements needed to enable independent living following hospital discharge • home improvements must be suitable for partially sighted, blind, hearing impaired. e.g. bigger dials on thermostat. 	<ul style="list-style-type: none"> • information about minor home improvement services e.g. handyman service • home improvement grants and schemes e.g. WarmFront. 	<ul style="list-style-type: none"> • home/ neighbourhood security and safety – poorly maintained property can indicate a vulnerable person living there and may be a target for crime • advice about entitlement • access to services – fear of upheaval.

Findings and Needs

Need	Findings	Example customer need	Related needs
<p>Access to services Barriers to accessing available services</p>	<ul style="list-style-type: none"> • mobility problems prevent customer accessing services – customer may not have regular access to a car or other transport, walking difficulties, falls. • rural isolation – customers unable to access services in town centre location • language barriers - older members of BME (black/ minority ethnic) groups unable to communicate with service providers • older people concerned about intrusion and upheaval, therefore may choose not to access support. • issues with trust • embarrassed about situation, too proud to ask for support • difficulty completing application forms and contacting organisations. 	<ul style="list-style-type: none"> • information about transport services such as dial-a-ride • local services in walking distance or town centre • internet skills for older people in order to access services online • opportunities for translation services and literature in different language. • help completing application forms or contacting service providers. 	<ul style="list-style-type: none"> • active, supportive, community – isolation
<p>Advice about entitlement Issues around awareness and availability of services</p>	<ul style="list-style-type: none"> • lack of awareness around available services and entitlement • complex services – many different services available, hard to find correct contact details and contact the right department. the customer has to know where to look • complex eligibility criteria and application process. 	<ul style="list-style-type: none"> • information about available services and eligibility • advice on welfare rights • benefits entitlement check e.g. cold weather payments • consumer advice • advice on how to make a complaint to trading standards or energy ombudsman. 	<ul style="list-style-type: none"> • access to services • day to day support – completing application forms.

Findings and Needs

Need	Findings	Example customer need	Related needs
Day to day support	<ul style="list-style-type: none"> • skills lost due to bereavement of a partner (e.g. traditionally men dealt with finances and women looked after the home/cooking etc.) • customer needs support with day to day tasks such as maintaining the house and garden • help completing application forms or contacting service providers. 	<ul style="list-style-type: none"> • advice about financial support • information about social services • education and skills courses around basic skills • budgeting workshops • home help services • information about personal alarms. 	<ul style="list-style-type: none"> • access to services • advice about entitlement.
Medical assistance	<ul style="list-style-type: none"> • mental health issues such as dementia or depression due to social isolation • poor nutrition due to low income. for example, older man living on Iceland £1 ready meals • emergency treatment due to trip or fall • respiratory problems due to living in cold/damp environment. • arthritis and joint pain due to living in cold/damp conditions. • risk of hyperthermia due to living in cold conditions • health issues due to lack of physical activity • A&E and rehabilitation services following a trip or fall. 	<ul style="list-style-type: none"> • need for regular medical check ups • need for prevention i.e. flu vaccinations • luncheon clubs where free hot meal is provided • meals on wheels services • social services support for mental health issues • physical activities for older people e.g. walking groups, active generation • support groups e.g. Alzheimer's Society. 	<ul style="list-style-type: none"> • active, supportive community • home/ neighbourhood safety • access to services • financial assistance.

Findings and Needs

Need	Findings	Example customer need	Related needs
<p>Active, supportive community</p>	<ul style="list-style-type: none"> • social isolation – older people who are isolated and unknown to public services are most at risk. • changes in culture – loss of community feeling e.g. checking in on older neighbours • older people reluctant to leave the house due to safety concerns e.g. older lady who went to the hairdressers once a week and had her property broken into whilst out. • a solution for those in fuel poverty is to go out a lot and leave the heating off but then return to freezing houses. 	<ul style="list-style-type: none"> • information about social groups, clubs, forums, interest groups. e.g. network 50+, active generation, library services. 	<ul style="list-style-type: none"> • access to services – mobility • home/ neighbourhood security and safety.



Findings and Needs

Need	Findings	Example customer need	Related needs
Home/ neighbourhood security and safety	<ul style="list-style-type: none"> • risks associated with using unconventional heating methods. for example, using multiple electric heaters, putting the cooker or to heat the house, cooking on a camp fire and throwing the fat back onto the open fire. • risks from poorly maintained electric blankets • trips/falls from trailing wires on heaters • fire/flood risks in neglected rooms • fraud – older person a victim of doorstep fraud. e.g. doorstep cold callers offering cheap insulation, suggesting that guidelines have changed and the home owner needs more insulation or charging the home owner for insulation and not fitting any at all (older person unable to go into the loft and check) • scam mail - older person struggling financially may also be susceptible to scam mail offering large monetary rewards • poorly maintained property can indicate a vulnerable person living there and may be a target for crime. 	<ul style="list-style-type: none"> • home safety checks by fire and rescue • installation of smoke/deaf alarms • community police – raising awareness of current scams and fraud campaigns. • information about trading standards. 	<ul style="list-style-type: none"> • home improvement • financial assistance – to make property safer • day to day support

Outputs

The Services Directory

A key finding of the research and consultation was that partners generally were unaware of what services were provided by each agency. In response to this, one of the key outputs of the project was the Services Directory, which was based on discussions held at the partner workshops.

Figure 3. Services Directory

Service	Organisation	Restrictions/Eligibility
HOME IMPROVEMENT		
<ul style="list-style-type: none"> Social housing 	Chorley Council	Contact Chorley Council for more information and general advice on housing options
Home energy efficiency grants		
<ul style="list-style-type: none"> Cavity Wall/Loft Insulation 	Chorley Council EEA – Cavity Wall/Loft Insulation	<p>Able to pay: £99 for cavity wall insulation and £99 for loft insulation.</p> <p>Free of charge: Householder or tenant renting from a private landlord, and in receipt of any of the following qualifying benefits:</p> <ul style="list-style-type: none"> Income Support Minimum Income Guarantee Housing benefit Income based job seekers allowance Council Tax benefit Pension credit
<ul style="list-style-type: none"> Grant packages of insulation and heating improvements 	Warm Front	<p>Must be:</p> <ul style="list-style-type: none"> Home owner or renting from a private landlord Aged 60 or over and in receipt of benefit. <p>A customer contribution to any works may be required.</p>
Home maintenance assistance		
<ul style="list-style-type: none"> Minor home repairs 	Chorley Council Minor repairs assistance – MRA Help for vulnerable households on low incomes to carry out repairs and improvements to bring home up to Decent Homes Standard	<p>Must be:</p> <ul style="list-style-type: none"> Owner occupier or private tenant House more than 10 years old Lived there for at least 3 years <p>Means tested unless on following benefit:</p> <ul style="list-style-type: none"> Income support Housing benefit Council tax benefit Income based job seekers Guarantee Pension credit Attendance allowance Disability living allowance War disablement pension Industrial injuries disablement

The directory is structured by need and lists all of the services available to meet that need along with a list of providers and their contact details. It also has some more general information to support partners such as library opening times, local GPs etc.

The guide was compiled based on insight gathered from partner workshops and information provided by the relevant organisations. It is designed as a starting point to encourage needs led thinking as a document that will hopefully evolve and develop. The service directory has since been distributed to around 70 front-line staff working for over a dozen local partners and service delivery organisations for older people. Including:

- Chorley Active Generation
- Help Direct
- Lancashire Fire and Rescue

The Service Directory is also being used as a template for similar projects involving complex needs including the Council's recent Total Alcohol programme.

Feedback on the Service Directory

“This document is really useful to us as it will really help us to signpost people when we are carrying out Home Fire Safety Checks. Quite often we come across people that we know need additional support and we don't know where to signpost them to, this will be useful as all the agencies are listed.

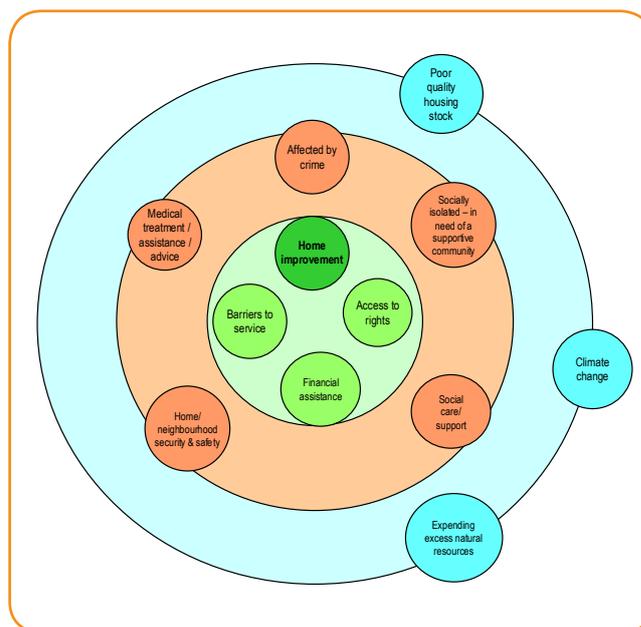
There are needs on that (Circle of Need) diagram that perhaps we would never have thought about. We would think of the obvious ones around benefits, repairs etc however issues like isolation wouldn't be something we would particularly focus on.”

Feedback on directory from Rachel Walker, Community Fire Safety Team Leader, Lancashire Fire and Rescue

Customer need template

The Circle of Customer Need template (figure below) is a quick capture system for an interview. Needs identified are ticked and cause and effect relationships are recorded by drawing arrows and making notes if necessary. Examples these recording template in use are included as part of the 'Approach' section as figures 1 and 2.

Figure 4. The Circle of Customer Need Front-Line Prompt / Recording Template



The template filled in to accompany these notes is shown in figure below. This is an example of a customer plan developed following an interview.

Figure 5. Capture of customer plans for update and learning

CUSTOMER PLAN		
Case ref: ABC		
Brief Description:		
90 year old lady, living alone, very vulnerable		
Services to be delivered:	Organisation:	Any eligibility issues?
Assessed for home improvement grant	Council MRA grant	Eligible for grant
Garden to be tidied and maintained	TBC	
Smoke alarms and deaf alarm	Fire and Rescue	
Referred for benefits check		
Customer initiatives:		
Customer has bought barking dog device as deterrence		
Outcomes:		
Customer now in process to receive services		
Future Concerns:		
Disruption caused by potential home improvements		
Comments/feedback:		
Customer previously unknown to public service organisations – one visit uncovered a range of issues that can now be addressed		

The learning points are collected by need, so that learning for the topic can be added to learning about the need from the perspective of other topics. The table below shows example learning for the ‘Need for Medical Treatment Assistance or Advice’, collated from the information contained in completed customer service plans.

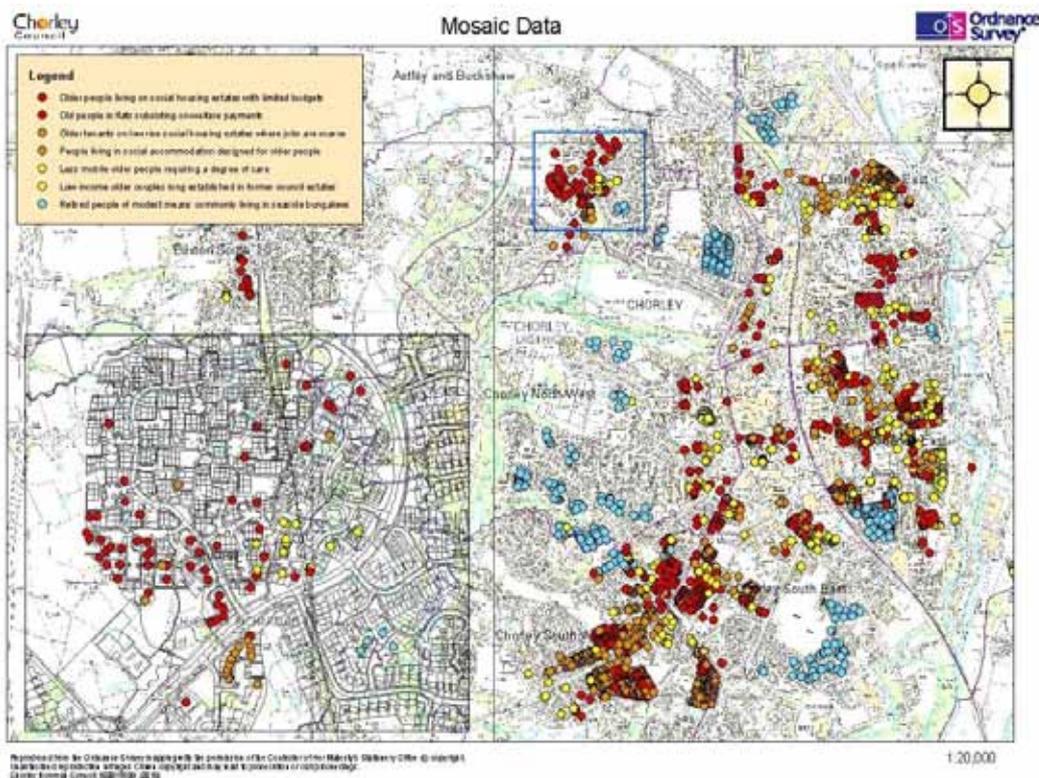
Figure 6. Extract from cause and effect summary

MEDICAL TREATMENT ASSISTANCE OR ADVICE	
Symptoms	Causes
Ill health - lung disease, heart and circulatory disease, viruses, joint movement, stress and high blood pressure	Cold damp accommodation
Ill health - poor mental health, depression, dementia	Deteriorating health
Issues with nutrition	Isolation
Lack of information/support to cope with illness	Slow recovery
	Not hot meals
	Can't open tins, turn locks
	Hyperthermia
	Inability to maintain house

Socio-demographic data maps

The maps produced as part of this process are now available to inform future strategy and are used by Chorley's policy team to identify areas where there is high risk or need some targeted action such as outreach work. The hotspot mapping will also be used to monitor performance improvement over time.

Figure 7. socio-demographic map



Outcomes

The projects generated benefits both through the engagement and outreach work which was undertaken to inform the approach to the Circle of Need Pilot, and the Pilot itself.

Benefits from engagement phase

The awareness raising campaign including rural outreach events, participation in International Older Peoples Day, Chorley Council's 'Smile Magazine' articles marketing and project outreach work achieved the following outcomes during October and November 2010:

Health

- vaccinated 30 people against seasonal winter flu at the OSS in partnership with NHS Central Lancashire

Fire Safety

- Worked in partnership with Lancashire Fire and Rescue service to increase referrals for their free home fire safety checks and installation of 10 year smoke alarms. The outreach work generated approximately 50 referrals. A single home fire safety check which prevents an accidental fire can save LFRS £20,000 as well as an estimated £26,043 in property damage, not least the cost of life.
- tested 200 electric blankets as part of a Lancashire wide initiative.

Energy Efficiency

- Promoted Chorley Energy Efficiency Raising Scheme – which ran from September 2010 to March 2011 and offered 130 loft insulations and 155 cavity wall insulations, saving local residents an estimated total of £22,250 on their fuel bills or an estimated average saving per household of approximately £140 per year.
- Ninety-nine of these measures (35 per cent of the total) were carried out for residents that the Council had defined as “priority” customers i.e. those over 70 or on low incomes (benefits claimants). The project's outreach work helped the scheme to reach this group.
- These calculations are based on Energy Saving Trust figures for typical savings for a gas heated three bedroom semi-detached home – with a loft insulation average saving of £40 and cavity wall average £110. Savings could potentially be more dependent on current level of insulation).

Benefits from the Circle of Need Pilot

Whilst there is an up-front cost for front line needs identification and capture, it only applies to customers with complex related needs and it can create the opportunity for significant downstream efficiency savings in the following ways :

Preventative Strategies

Nipping issues in the bud leads to less total resource to resolve: e.g. hospitalisation costs



avoided by early action to resolve damp and cold living conditions For example, of the pilot cases:

- 71 per cent were referred onto the Fire and Rescue service for home fire Safety checks
- a further 43 per cent were signposted and guided through the Council's Energy Efficiency grants application
- 42 per cent were also signposted onto other charity or voluntary services such as Dial-a-Ride, Active Generation leisure activities and Help Direct.
- referrals were also made to Social Services, NHS falls team (falls among over 65's are estimated to cost the NHS £4.6m a day) as well as other services such as electric blanket testing.

Avoidable Contact

- Resolution at first point of contact avoiding later repetitious interviews with different front line staff, or different organisations results in operational efficiency savings to the participating organisations. For example previously, it is estimated that to identify and access a single complex service (such as a grant) a customer would require two face to face interactions and three telephone conversations at a cost of £17.32.
- Following the Circles of Customer Need process, the case worker was able to offer

three services with an average of one follow up visit and one follow up telephone call. This represents an estimated potential saving of £39.12/75 per cent per customer.

- If 15 case workers/home visitors/home workers from across the LSP visit two customers per month with complex needs and offer on average three additional services, this will be a total saving of £14,083 per annum in avoidable contact alone.
- Alternatively, the two most frequently occurring Mosaic groups M56 and M57 (identified previously) constitute a total of 1,713 households, representing a potential saving of £67,012.56 to the Council.

Benefits from becoming more effective

As a systems thinking based approach, Circle of Need enables front line staff to look for the most effective solution for the individual customer. Broadening the enquiry from a presenting need to a pattern of related needs enables them to discuss the best place to start to resolve the issue. On average, a resident who goes through the Circle of Need process receives three new services.

However, over and above delivering a higher 'volume' of services, the Circle of Need approach ensures that customers receive the most appropriate services according to their need. So some older people may be signposted to a range of services, whereas others may learn of a specific service that directly addresses their needs e.g. cookery classes or luncheon clubs which helps to resolve a range of issues relating to health, nutrition, cost of living (food costs). Similarly, support for independent living may be best supported through a mobility service. The insight learning that Circle of Need generates helps to identify specific solutions to specific needs – which helps drive the efficient use of resources overall.



The approach also produces potential wins for a range of stakeholders from a single action: e.g. insulating a house results in:

- improved housing stock for the community
- warmer living conditions for the customer
- reduction in their carbon footprint.

Support for collaboration

Understanding the needs and their relationships at first point of contact can enable the most effective services to be selected, regardless of service provider. The customer and the service providers can avoid repetitive explanations and multiple visits making it more effective for the customer, while the service providers can streamline their delivery of services for efficiency gains (by eliminating common steps and, optimising use of scarce resources).

Innovation and co-design

An understanding of a customer's needs and the relationships between different needs can empower front-line staff and their customers

to work together to develop innovative approaches. The resulting customer plans include elements of the customer's own initiatives with public and voluntary sector contributions. For example, an old lady prone to falls was visited by Home Improvement Agency to complete a DFG assessment. In the meantime, she left a key with a trusted neighbour so that they could get in to check on her if they were concerned she had fallen.

In a similar vein, the co-design element of the Circle of Need enables customers to contribute to the resolution of their issues, reducing their dependence on external services. For example, during a Circle of Need evaluation one older person suggested "My daughter will take me to the day centre on way to work, if you can arrange transport home for me."

Governance and resourcing

The project was allocated a dedicated project manager who managed the day to day running of the project using Chorley Council's formal project management method which is based on a cut down version of PRINCE2 project management methodology. This ensured that expenditure was carefully managed, risks identified and mitigated against early and that key deliverables for the project were met.

The project team comprised of members of the Council's transformation department including the Head of Transformation as project sponsor, with representation from other key departments including Housing and Environmental Health along with the Fire and Rescue as a key partner.

A consultant was engaged to support the application and development of Circles of Need in line with project objectives.

A range of local partners also participated in the project, contributing:

- their experience of working with Older People and their understanding of the issues
- their participation in (and organisation of) outreach events
- detailed service information for inclusion in the Service Directory.

These partners included:

- Lancashire Help Direct
- Lancashire County Council Trading Standards
- Lancashire Fire and Rescue
- Chorley Citizens Advice Bureau
- Chorley Council information team
- Central Lancashire Primary Care Trust
- Chorley Council Housing, Housing standards and Home Improvement Agency
- Chorley Community Police
- Age UK
- Brothers of Charity.

The project produced monthly reports as part of this mechanism which then fed into key project updates for LSP and Council members. The final report from the project was presented to the Executive Member for Health and Older People. The project manager also regularly attended specific meetings of all relevant organisations and groups to give updates which also served to enhance partner engagement and facilitate opportunities for knowledge sharing.

Challenges and lessons learnt

Partnership working

Workshops with partners showed that there is still very much an organisation focus rather than a focus on the needs of the customer. Customer-centre partnership working requires a change of culture and of mind-set. The experience of the project suggests that this is best achieved through small steps e.g. structuring the service directory by need.

Partnership working requires broad timescales due to the nature and structure of other public organisations. Commitment to innovative projects such as this often requires approval from senior levels for allocation of time and resources and this can take time. The task is to find a way to align priorities or exploit specific organisational priorities for the benefit of the customer.

For complex issues and innovative projects, it's crucial to be able to react to project developments by thinking creatively to pursue the best possible outcomes.

A project needs to be flexible and able to react to project developments and change direction if necessary. This illustrates the importance of high level planning and regular reviews, engagement via formal governance, and monitoring by the project board.

Pilot learning

- Short term concerns and fear of the unknown often meant that partners were unable to see potential longer term benefits of a needs based joined up approach. Once a few cases had been generated it became easier to persuade others of the benefits and get them involved in the pilot.
- Identifying a key individual within each partner organisation to lead is important. The individual must buy-in to the approach and be open to innovative ways of working if they are to fully apply the tools and techniques and sell the ideas on to their colleagues.
- The knowledge generated from interviews and distilled through the learning process can be used to create more effective tools to aid swift and reliable diagnosis and service selection. Thus the cost of diagnosis can be reduced and more partners attracted to join in, growing the scope of the pilot.
- Although the project has generated a positive response from customers it's difficult for staff to adopt a new mind set which is at odds with their current tools and easy for them to slip back into service centric and organisationally limited thinking.

Next steps

Though the practitioner tools currently focus on fuel poverty, topics can be based on the related needs of other topics e.g. the security needs of older people. They are much less costly to introduce as much of the work is already done. Furthermore, the addition of more partners will also lower the costs. This approach should provide an evolutionary route into radical change. It is based on and builds from effective teamwork, where the benefits of learning are shared and

collaboration demonstrates the value of a wide variety of talents and experience.

The Services Directory has met with a very positive response, equipping service providers with a single, simple reference for all information related to older people and fuel poverty. Its clear structure also provides a valuable next step into needs-led working.

However, its current format as a hard copy directory and paper based tools, maintained locally by the Council means that its use is limited as inevitably the information will quickly become out of date as information changes and new services are added. Developing effective IT support for customer centric working is essential to achieve the large and long term benefits of this approach. To ensure the on-going value of the Services Directory, the resource must now be moved online into a dynamic document that can be updated and maintained by all partners and service providers. This will also present the opportunity to potentially incorporate customer insight for other issues for older people, building a single resource for any need an older person may have.

As with the Service Directory, the Circle of Need tools also need to be translated into a more user-friendly format to make their day to day use sustainable. The project is currently seeking further support and funding from Chorley Council to implement the Circle of Need approach demonstrated by this proof of concept.





Local Government Association

Local Government House

Smith Square

London SW1P 3HZ

Telephone 020 7664 3000

Fax 020 7664 3030

Email info@local.gov.uk

www.local.gov.uk

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