# Insights and Learning Session

## Blended Delivery (video here)

### 1. Welcome and introductions

Attendees introduced themselves and their interests via the chat function.

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| Clare from the Access to Justice Foundation. I'm interested in getting a better understanding of when and why remote service delivery works and doesn't so we can fund services in the most impactful way. |
| Sue from Slough Immigration Aid Unit, here to get further ideas for improving how we work when not in the office |
| Emma Bland representing Pro Bono Community, here to learn more. |
| Aaliya Seyal here from Legal Services Agency we are a law centre based in Glasgow with a national remit. We are interested to learning more. |
| Warren Davis from the SRA. here to learn more. |
| Amal Laamairi - I will be the Blended Support Lead in Hestia. I am interested getting a better understanding. |
| Farhana from FFRAP (www.ffrap.org) promoting the rights of LIPs in the FJS. Interested in current developments. |
| Al Mcclenahan from Justice For Tenants. We mostly help tenants take action in the Tribunal for Rent Repayment Orders and provide free training to housing enforcement teams to use new enforcement powers to improve standards for renters. I want to learn more and understand more so we can improve how we support tenants and improve standards. |
| Laura Holland, Senior Solicitor from Citizens Advice North Yorkshire and always interested in developments that help us to help our clients. |
| Olivia Bushell from Skadden - here as a partner firm of FFRAP interested in learning more about developments to help LIPs. |
| Alice from Asylum Support Appeals Project. We're actively thinking about developing new services. Hear to listen and learn and think about how the information/discussion feeds into our service development. |
| Alex Charles from Law Centres Network interested to hear latest developments and methods for blended service delivery |
| Heather Jessop, Citizens Advice Liverpool, currently delivering some blended services but revisiting the balance of face to face and digital/telephone looking at how the cost of living crisis may affect our delivery |
| Fiona Costello from GYROS- Great Yarmouth Refugee Outreach and Support. Generalist IAG and specialist OISC + FCA accredited advice organisation (multilingual)- Norfolk + Suffolk. I also work in research at the University of Cambridge (EU Migrant Worker Project) examining the role of generalist (non-legal) advice agencies in the legal advice landscape, particularly in legal advice deserts. |
| Tiya from the Access to Justice Foundation. I work on LSLIP and here to learn more about how other organisations experienced blended delivery. |
| Carol Storer, freelance consultant, working with a number of organisations and a trustee of several access to justice charities. Here to find out more. |
| Lucy Williams from Citizens Advice Caerphilly Blaenau Gwent. We offer blended advice and looking at how to evaluate the balance going forward. Internet issues so no video to preserve audio. |

Paige Welham, a social researcher in the Access to Justice Research team at the MoJ. I've been working with the ATJF team on the evaluation of the Legal Support for Litigants in Person Grant, and with Jess, Dan and Dani on this blended study. Great to join today :)

MdlR gave an overview to the purpose of the meeting. This is a tester session aiming to give more time to allow a more in depth exploration of some of the projects and updates that have been shared, at the Justice and Innovation Group in particular.

The session will focus on how this information and learning can be implemented into our work, and what additional resources we might need to do that. If the content and the format are useful, the Network will look to continue these sessions.

MdlR reiterated the role of the Network for Justice to link the community with knowledge and expertise that can improve their work, and to bring together learning to understand more about the issues, and solutions with a focus on areas of interest as defined or highlighted by the community.

## 2. Access to Justice and Blended Advice (video [here](here))

The focus of the session was blended service delivery models, also referred to as hybrid services. This a topic that has been repeatedly discussed at the Justice and Innovation Group and there has been some interesting experiences and approaches shared there.

The aim of this session was to understand what the research tells us both about the efficacy of blended service delivery models, and the experience of those at the frontline adapting their services to build in blended models.

Dr Jess Mant from Monash University Australia, and Dr Dan Newman and Danielle O'Shea from the University of Cardiff shared an overview of the research project they recently conducted on blended service delivery models.

### *Definitions*

**Blended advice** is advice provision which involves a combination of face to face and remote methods. Hybrid advice or delivery is also valid but "blended" was the term that emerged through focus groups with frontline providers

**Triage** is an initial assessment of legal need and client capabilities when the user presents. This can be done remotely or in person.

## Frontline experience, focus group feedback

### *Opportunities of blended advice*

- **Enables services to reach a broader range of clients** (people encountering legal issues for the first time during the pandemic, people for whom the service was made more accessible through blended delivery e.g., disabled people or people with caring commitments, overcome geographical limitations)
- **Enables advice to be more efficient and effective in terms of meeting user needs.** There is a more efficient use of adviser resources (going remote allowed service providers to maximise their time, fewer missed appointments)
- **Services innovated meet a new demand in legal need** or improving accessibility of services for certain groups
- **Majority of staff were in favour of a blended approach** after lockdown restrictions began to ease.
- **Meeting the changing expectations of users** in terms of how they approach and what they want from services.

*Challenges of blended advice*

- Potential exclusion of certain client groups (people lacking digital literacy or technological resources)
- The pandemic also made it more difficult to reach some marginalised groups
- Resource intensive approach (increased workload and administration, more clients, more work, quick turnaround)
- Lack of infrastructure put pressure on staff (impacting wellbeing, morale, and professional development) and existing frameworks. Flexibility and adaptability shown by frontline this was in part due to the lack of infrastructure present at the frontline due to underfunding

## Client experience, interviews

- **Increase in accessibility for some people but not for others**. The restrictions did mean that some people improved their digital literacy, others were reliant on support to access digital services. Overall, going digital by default would limit access to services.
- **Blended delivery was seen as a "welcome practice".** More specifically, the flexibility of approach that a blended model of service delivery necessitated was appreciated. This is what increased autonomy and empowerment in the advice process.
- **The opportunities to develop a trusting relationship between advisers and clients are limited by remote (over face to face) service delivery** however, having an element of social interaction in remote practices does help build this rapport. This may help overcome some of the barriers that instant messaging and telephone only advice in particular, present.

## The Future of Blended Advice

Blended advice has been a key part of enabling services to continue to meet changing user needs and expectations and so it is important to explore what this looks like going forward.

*What doesn't work*

- **Broad brush approaches**
  - Using a "default" approach to people does not align with user expectations, or what the pandemic has taught us about their needs.
  - There are rarely clear cut categories of client or problem. We have to recognise difference and we have to plan for individuality
- **Using remoted services by default**
  - Blended advice shouldn't mean face to face advice is phased out altogether.
  - Remote service delivery methods are not for everyone
    - Some users may feel comfortable discussing an issue on the telephone but will need to meet someone in person to go through paperwork
    - Some users will always need face to face support. This may include people who don't have access to technology. It is particularly common in Housing Law cases and people who are facing homelessness.
    - Younger clients can often be more receptive to advice with remote methods because they particularly engage with approaches like using WhatsApp
- **(Most importantly) assessing the suitability of blended models based on problem type or client characteristics.**
  - It's important not to be too prescriptive about who might hold what attitudes towards which methods, and we certainly shouldn't base that on conjecture or assumption.
  - One of the most crucial aspects is to ask individual clients what they require.
    - Two disabled people may identify the same about how they are differently abled, but one might find remote methods mitigate their disability and the other might fide it exacerbates it.
    - Two people for whom English is not a first language may find that face to face makes it easier to communicate in English others may find it makes it more awkward.

*What does work*

- **Organisational ability to be flexible to individual user needs.**
  - o We can't prescribe a specific model of blended delivery best practice to adopt so organisations will need to be able to assess and adapt to difference.
  - o This will create challenges for the sector
    - ▪ It creates greater complexity, logistical, and organisational issues.
    - ▪ It requires services to offer what amounts to a bespoke service matching the appropriate service to individual users.
    - ▪ The task of determining the balance between remote and face to face advice is something the sector an advisers need to consider on a case by case basis.
  - o The advice sector needs to be flexible, collaborative, adaptive, innovative. It has been these things throughout the pandemic, and this is what blended services have worked.
- **Advisers working directly with users to ascertaining needs, capabilities, and preferences.**
  - o Blended methods have the potential to empower users, giving them more options for navigating and resolving their problems in a way that works for them and improving their experiences.
  - o This improved experience means it's more likely people will come back to seek further help at an earlier stage moving forward.
- **Crucial to achieving success is that initial triage is provided at the point that users present**, with a willingness to adapt the approach throughout if necessary.
  - o Advisers need to be able to cater to user needs, and to include the user in decision making on how and when advice should be provided.
  - o Advisers need to be able to assess a complex set of factors and circumstances that determine suitability of services and not try to pre-empt or anticipate the kind of advice methods that any individual client will need.
  - o The way to determine this is through triage which ideally would be done by meeting the user in person and working with them to determine whether they need more face to face support going forward, or whether a remote method might work for them.

## Three key lessons

1. **There is no "one-size-fits-all" solution**.
   The future of advice is flexible and a bespoke service for each user, this is very different from the context of advice before the pandemic, but user expectations are no longer aligned with how we used to work.
2. **Blended advice requires further evaluation to understand how it can be most effective.**
   We should continue to investigate how effective different methods of advice provision are in terms of how legal need is changing, as the effects of the pandemic continue to develop, and as new elements of need (such as the cost of living crisis, and a broader range of users in need of legal services) arise.
3. **Blended advice is more resource intensive and successful blended models will require a well-supported sector.**
   The post pandemic world of advice has the potential to deliver higher quality, and more accessible services but these benefits and opportunities hinge on increased levels of resources for the sector enabling it to overcome the challenges blended delivery models pose to sector organisation such as time and resources dedicated to forward planning, impacts on workload and impacts on wellbeing.

*Blended delivery best practice*

Our understanding of best practise is currently dependant on the circumstances and on the client. However, the two elements that we can say are crucial to making blended services work are:

1. **A commitment to flexibility to deliver a bespoke service, and**
2. **Initial triage**

### 3. Other learning around this topic (video [here](#))

There have been several research projects working on this topic in tandem, with slightly different jurisdictional focuses.

Ceri Hutton recently launched a report with the Paul Hamlyn Foundation on *How the remote delivery of immigration advice evolved during COVID: The digital and capacity implications of this change.*

The report focuses on the immigration advice sector win the context of:

- The immigration advice sector "trying to do more with less" as a result of LASPO, Brexit, and other policy decisions driving demand and reducing funding for advice.
- The immigration advice sector being used to thinking quickly on their feet and innovating.
- Pre pandemic, the immigration advice sector feeling that it was too difficult to conduct successful casework remotely due to the nature of the client group and issues around language proficiency and complex cases. The pandemic acted as a huge catalyst for change in this regard.

Ceri spoke about how learnings from the two reports overlapped and diverged.

*Similarities*

- **Implementing new ways of triaging users.**
  - Done to preserve increasingly precious capacity of specialist advisers
  - Winnowing out users who did not require a high level of specialist adviser time happened efficiently before the user had access to an adviser
- **Not assuming the methods that are going to appeal to different user groups.**
  - Virtually all users had access to a smartphone (even if they didn't own one) and access to free or relatively cheap platforms such as Microsoft Teams, Zoom, etc.
- **Increased legal need as a result of the pandemic.**
  - Though there have been some elements of advice that have seen decreased need as a result of government intervention
  - Policy also has a large influence on legal need in this area such as No Recourse to Public Funds, Hostile Environment, etc.
- **Blended advice services are here to stay.**
  - For some user groups blended services are hugely beneficial, while for others it is not. Face to face support is particularly needed for asylum seekers and complex human rights cases as there needs to be a high level of trust and understanding to get the relevant details for the case.

*Differences*

- **Rather than seeing more users, some organisations initially reported that they were seeing fewer people.**
  - The mechanism set-up to source and support users were based on drop in systems. With this option being taken away there was more evaluation of how and where to place services in order to reach the communities that most needed their help including lateral thinking and partnerships with, for example, foodbanks.
- **Document transfer and data security were hugely important areas of concern and development,** with lively debate a learning being shared across the sector.
  - There is a balance between pragmatism of what people would use and keeping information as safe and secure a possible.
    - WhatsApp and Email were the preferred choice with many moving away from Facebook Messenger.
    - New methods of accessing and rationalising user documents were also introduced.
- **Client facing technology has been used to increase outreach and enabling some parts of the initial triage to be done in digitally competent ways.** Some examples include:
  - Voices in Exile: https://www.voicesinexile.org/immigration-toolkit/
  - South West London Law Centres: https://swllc.org/get-advice/crisis-navigation/
  - FLOWS: https://www.flows.org.uk/

As a follow on from the report Ceri and the Paul Hamlyn Foundation will be running some workshops in September on key issues identified such as data security and client facing technology. Please get in touch with Ceri to learn more: cerihutton@mac.com.

### 4. What is needed so we can we adopt, change, and develop (video here)

As well as learnings from the two reports speakers also highlighted some specific recommendations to different parts of the community which would enable us to achieve better service delivery using blended methods.

### a. What does success in blended service delivery look like? (video here)

*JM*: **Capability in users to engage, and a sense of autonomy and empowerment in that process**. In some casers users were only willing to participate in the research because they had been "verified" by advisers that they had relied upon in the past.

There was a great deal of **trust established through advice**, we may have tank that for granted with face to face interactions, but it is much harder to build that relationship when technology is involved.

This relationship is something that needs to be considered from the very beginning and throughout the advice interaction, either by utilising an initial face to face session or by putting additional effort into remote interactions.

### *What was the impact of using technology or online tools as a way of delivering initial triage? (video here)*

*CH*: Not every example is using technology to deliver triage, some (for example the Voices in Exile Toolkit) are helping users to navigate or assemble the documents they need for a particular part of the process to provide some form of advice for people who would otherwise not receive it due to the lack of capacity to meet demand.

Citizens Advice Sheffield is a remote access point (a library) that links the user directly with an adviser via a camera and touch screen computer.

There is a difficulty in talking about how and who is picked up for advice. At the frontline, while every care is taken to provide user centred advice staff are also under enormous pressure to meet huge increases on demand for their services.

On of the success factors of blended delivery is that **more people can be helped because specialist adviser time is being used to best effect and being used for complex areas and activities (including taking time to build a relationship of trust with clients**. Other functions of document collection, organisation, triage, and winnowing out unsuitable cases can be done remotely and/or through digital tools.

### b. How are services making decisions on which users are best suited for blended advice? (video here)

*JM*: there will always be some indicative factors, characteristics, circumstances, and problems which will be identifiable to people who have experience of working on the frontline, that will make it more likely that a given method will be more appropriate.

Even within the small scale of our study we identified certain cohorts that were more likely to benefit, for example people with mobility related disabilities benefited from the increased accessibility of advice as they were able to engage remotely.

However, it is important that advice services do not make assumptions as, just because one indicator of potential benefit exists, there may be other factors that mitigate the benefit such as lack of access to technology.

One of the key factors to making these decisions is **the expertise of the sector at the frontline using their experience to make balanced decisions and having the resource of time to ask the**

**questions necessary**. Advisers are attuned to the fact that some groups of users will always find it difficult to engage with services remotely and will need face to face advice.

*Who is it, which role within the organisation, is responsible for making these decisions? (video [here](here))*

*CH*: It depends, it happens in a range of ways. **There is an exploration of how much triage can be done digitally** and the pros and cons of this, Coventry Law Centre, South West London Law Centre, and RCJ Advice via FLOWS are all doing work around this. Users answer questions and the issues are distilled from the answers.

Hackney Migrants Centre **train and supervise volunteers** who ask users question to ascertain whether their case is suitable and in need of specialist advice. During the pandemic this was shifted online bringing with it challenges around sharing documents which were previously identified and viewed quickly in person. The shift to remote working mean that a new process of acquiring, looking at, and transferring documents had to be implemented.

Remote triage can work for users but the process of getting the information necessary to decide on the suitability of the case is more challenging.

### c. What organisational structures or working environments influence delivering blended advice? (video **[here](here)**)

*CH*: A critical element of some organisations being able to continue over the course of the pandemic was that they had **strong partnerships with people in the statutory and voluntary sectors who could provide wraparound support (including some of the work with documents) and access to specific user groups**.

Without this, particularly for some client groups, it would not have been possible to provide remote advice e.g., victims of trafficking, people in carer homes.  Here it was critical that voluntary organisations who wanted to provide advice had strong partnerships with those organisations still in contact with the users.

*JM*: Organisations located in more rural areas were already quite well set up with these partnership models, those who were not rapidly worked to develop those partnership because **it was quite often a logistical necessity to enable them to reach broader range of users**. By having links with social workers, for example, people going to home visits could sit users down with an iPad enabling access that would otherwise not be possible.

It is important for these partnerships to continue and be sustained as they will have an important role in ensuring the success of blended delivery in the future.

### d. Where should funding for this work be focused, and what should be prioritised when supporting blended delivery in the broader context of advice provision? (video **[here](here)**)

*DN*: There were concerns from the frontline that policy makers and funders may be seduced by the numbers because with blended advice there was the opportunity to see a much larger number of users, producing an uptick in volume.

However, **in order for advice to be effective there must also be an investment in quality, and the time and space for holistic approaches balancing supporting users who need more time and support, and the time and resources it takes for organisations to form partnerships to reach and serve marginalised communities.**

There needs to be the funding to allow for and support both approaches.

*CH*: The pandemic stimulated (rather than began) innovation around the use of technology solutions. In a very few places there were tech savvy people within the organisation who were there to think through issues like data security, and the integration of users sent information into case management systems such as Clio. These people would make an intelligent assessment of what was needed in house and guide the organisation through the implementation of this.

Lawyers aren't always "change-embracers" so introducing new technology can take time and it needs leadership from inside an organisation. There are also barriers around "not knowing the unknown" most advice agencies can "get by" in terms of utilising and implementing technology but are not **specialists who understand the full potential new technologies offer.**

The learning from frontline tech experts ranges from the "simple" investing in good headsets and microphones which facilitate easier communication, particularly where English is not a first language, to more complex activities like developing apps to enable users to input information and documents directly into a case management system (Sheffield Hallam University Refugee Rights Hub). These insights are valuable not only in terms of service delivery, but also in terms of origination efficacy and sustainability.

### e. What infrastructure, roles, and skills do organisations and staff need to have? (video here)

*CH*: In order to drive innovation, **you need technologists who know what they're doing, it is a specialism that should be invested in rather than cobbled together from other parts of the organisation.** We need investment in leaders and thoughtful teachers of technology within advice agencies if we are going to evolve the systems that support blended delivery in a way that is both client friendly and an efficient of the use of specialist adviser time.

*JM*: **Scaling up of the knowledge sharing, collaboration, and peer support that organisations are already doing both internally and externally.**

Funding introduced during the pandemic treated the pandemic as a temporary incident to be weathered before things returned "back to normal". This is not a reality in terms of the level and type of legal need.

Funding in recognition of the ongoing and long term nature of the crisis would be beneficial as well as investment in forums and other opportunities to share knowledge, best practice, and developing an understanding what works and what doesn't in different contexts.

**Long term funding is crucial to allow organisations to plan for the longer term and invest in the technology, working practices, and training necessary to support improvements in service delivery like blended advice.**

*Comment from the chat: This kind of tech support could (should?) be provided sector-wide rather than be employed in those advice agencies that a) can afford it and b) know how to make use of it.*

*CH*: Agree with this approach as, ultimately, you can't afford one tech specialist per advice service provider. This approach is different to creating and supporting communities of practise where information is shared around technology.

In addition, we need **active support offered to organisations to audit, to review, and to put in place new baseline tech solutions such as case management systems but then also to audit, trial, pilot, and promote new systems as they come in to find out if there is benefit to sector organisations in implementing new solutions.**

There is support from funders to invest in innovation, but it is important to also invest in the mechanisms that allow for contextualising innovation in the advice sector, and then the scaling up and rolling out of identified solutions.

Attendees shared some comments.

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| ***Chanel shift*** | Chanel shift is essential to give a rounded service |
| ***Funders and funding approaches*** | Grantees of the LSLIP programme said it was very refreshing and useful that the funders didn't focus on numbers but on learning e.g., about early intervention. |
| | Core funding and infrastructure funding is essential |
| ***Tech and data support*** | One recommendation is that there are sector-wide hubs of expertise which can support organisations. The LCN Digital Support Team is a great example of this - for law centres of course - but it is terrific. |
| | Tech support should go hand-in-hand with encouraging and enabling better data collection, analysis, and 'data maturity'. |
| | I've been thinking about this in terms of data and the need for data leadership in the sector. I've written some thoughts about this which I've kept open for |

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| comments https://docs.google.com/document/d/1tEIIiMGbZ-nD7Tw67d20uhMxqKWO0rA6Mp7Z3y5KHDA/edit# |

## 5. What more do we need? (video here)

For the final part of this speakers explored what more is needed, in addition to the funding and infrastructure needs identified above, to address gaps in our understanding of this topic.

*JM*: Future research is incredibly important as this initial research was a rapid review of what was happening in the sector and was very much a small scale qualitative study.

These methods need to be replicated in other areas of law where advice is provided in blended formats, and then scaled up to a quantitative, more comprehensive evaluation of what works and what doesn't work. We need robust data in order to properly invest and so, alongside improving funding to the sector we should be developing mechanisms to collect data that we can use for ongoing evaluation and monitoring of what resources are needed and where they need to be targeted.

**We have reached a turning point and moving forward, we need to make commitment to investing in data collection, rigorous research, and ongoing evaluation.**

## 6. Meeting Close

MdlR extended thanks to the speakers and those who shared their learnings and experiences via the chat, with the rest of the community.

This was an initial session dedicated to insights and learning. There has been a positive initial response form the academic community and we have several topics provisionally lined up including Health Justice Partnerships, and community partnerships and referral networks.

Attendees were encouraged to share their feedback on the structure of the group and content of the meeting, including what would be useful to do more of moving forward. Please complete this survey to share your thoughts.