

# Connecting Advice in Dorset

## VIDEO-LINK PILOT

### FINAL REPORT



Citizens Advice in Dorset *in partnership with:*  
The charity for our community

Shelter

Ansbury  
Quality Careers Advice and Guidance  
Part of Continuum Consortium



LOTTERY FUNDED

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Report produced by Connecting Advice in Dorset, November 2015  
For more information contact Bryony Brown, Project Manager

bryony@caidorset.org.uk  
www.advisedorset.org.uk

## 2 Introduction and Background

The Connecting Advice in Dorset project is a 2-year project funded by the National Lottery through the Big Lottery Advice Services Transition Fund. The purpose of the project is to develop and strengthen an integrated network of advice agencies in Bournemouth, Dorset and Poole areas, enabling providers to deliver a more efficient and comprehensive service to clients. There are three clear outcomes:

- Advice Services will collaborate and co-operate at district and borough levels to make best use of resources
- More people will be able to access a quality advice service they need in a manner appropriate to the location and needs
- The advice sector across Bournemouth, Dorset and Poole will be more effective and resilient.

To achieve our second outcome, the project proposed to work with advice organisations to tackle issues such as rural isolation in innovative ways, enabling rural clients to reach an advice/support service to help them. The use of 'new technology' (i.e. emails, webchat and video-linking) was seen as a key part in increasing access to advice, alongside the development of a single phone number and a joint website.

## 3 Using new technology to deliver advice

Dorset is a particularly rural county, with a population of 414,900 in 2,542km<sup>2</sup>. This means the county is sparsely populated with 163 persons per km<sup>2</sup> (compared to 375 for England and Wales)<sup>1</sup>.

45 neighbourhoods (LSOA's) are in the most deprived 10% in England in terms of access to housing and services, with 82 neighbourhoods in the most deprived 20%<sup>2</sup>.

Rural isolation is an increasing problem as local public transport declines and communities shrink as residents move out into more populated areas. Typically, the sections of the rural communities particularly badly affected include the young (single young people and families) the elderly, the disabled (particularly with mobility issues), their carers, and migrant labourers.

It was anticipated that using new technology to provide advice would enable more clients to access help and support by removing the need for them to travel lengthy distances to face to face services.

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<sup>1</sup> <https://www.dorsetforyou.com/article/333003/Key-facts-on-Dorset---general>

<sup>2</sup> Indices of Multiple Deprivation, 2015

In addition, advice services were, and still are, under pressure to provide advice to an increasing number of clients but within diminishing resources. Ensuring outreach locations are adequately staffed needs to be balanced with maintaining a strong core service in central locations. The use of new technology was seen as one way of solving these resourcing issues.

#### **4 Other video-link projects**

To inform the development of the pilot, some research was carried out to look at where video-links had been used elsewhere, and to learn from these examples.

**Citizens Advice Wealden** used funding from the Big Lottery to offer a virtual drop-in. The service enables clients to Skype from their own home at set times of the day. Take-up was initially slow and an Outreach & Promotion officer was employed to promote the service. In addition, there were technical issues mainly at the client end.

Some years back, **Citizens Advice Cornwall** invested in expensive technology in order to provide access to advice using video-linking but found clients were reluctant or lacked the expertise to use the equipment. All of the the offices in the east of the county were linked up via video conferencing and there were two units placed in external locations, one at Ginsters (the pasty company) and another at the community office at Treneere Housing estate. There was very low usage of the system, with some units not being used at all.

**Ansbury** in Dorset trialled giving advice using video-links from advisers working from home but found it difficult to control the environment and had issues with privacy and confidentiality.

The **Big White Wall** mental health charity has successfully used video-links for delivering therapy

**Citizens Advice Brent** have been using Skype to link to a legal firm in the City of London who give a number of hours of pro-bono specialist legal advice but do not want to waste time in travelling. They set up a video-link operation that has been very successful and now want to extend video linking to other services that they offer.

Australian National Pro-bono Resource Centre **use video-links to provide assistance to self-represented litigants in regional, rural and remote Australia.**

Montana Legal Service Association **in the USA uses nearly 50 video-links to support access to justice at self-help clinics. Their experience was that: *"It is clear that private attorneys are more willing to provide assistance if they do not feel that they have to travel large distances for interviews and hearings. Even if the travel burden would be borne by the litigant if there***

***were no video, the attorney appreciates the greater chance that the litigant will turn up and will be there on time when video is used.”***

Colorado Legal Services in the USA ran a monthly “Skype-a-Lawyer” service where the clients can call in from a location of their choosing by appointment. This successful service is now being expanded throughout the state.

## **5 The Initial Stages**

At the beginning of the Connecting Advice in Dorset project, it was understood that a number of local advice organisations were eager to explore and develop these new advice channels but were held back by the challenges in understanding and implementing the changes required. The rollout of Super Fast Broadband across Dorset by 2016 made the innovative use of digital advice channels more possible than previously.

In September 2014, the Project Advisory Board (PAB) agreed to seek technical assistance to help them make decisions about the way forward. Credus Ltd were appointed to carry out this work and reported back to the PAB in December 2014.

This initial report<sup>3</sup> included a summary of the ‘new technology’ available to use in the delivery of advice (circulated widely within the local advice sector), and also a report<sup>4</sup> to the PAB with a recommendations for a way forward to test the use of video-linking. The recommendations included:

- The use of ‘fixed sites’ rather than allowing clients to access advice from their own home, or through an agency website (‘Fixed sites’ describes where a link is established between two sites, from an advice agency at one end to a site in a community location such as a library or community centre. The equipment at the community location could be permanent or set up just for the advice session).
- Establishing a pilot programme with two sets of equipment at ‘fixed’ sites
- Using pre-booked video-link sessions for Tier 1 and Tier 2 advice (i.e. after the client has had an initial ‘gateway’ session to assess their advice needs)
- Providing technical support at the community location to assist the client in using the technology
- Using mobile equipment (e.g. laptops rather than desktop PCs) at the community location, to enable the equipment to be used on multiple sites
- Ensuring a confidential area was made available within the advice agency and within the community location for the video-link session

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<sup>3</sup> Access to Advice through New Technology: Technology Survey, November 2014, Credus Ltd.

<sup>4</sup> Access to Advice through New Technology, November 2014, Credus Ltd.

## 6 The Pilot Project

The pilot project consisted of three clear phases:

- Phase 1 – the Development Phase (February and March 2015)
- Phase 2 – the Pilot Phase (April – September 2015)
- Phase 3 – the Follow Up Phase (October and November 2015)

### 6.1 Phase 1 – the Development Phase

During these two months, Credus undertook a number of tasks in preparation for the pilot period. This included:

- Surveying potential sites and reporting on their suitability for the pilot
- Specifying and purchasing equipment, including deciding on a technical solution for printing and scanning
- Agreeing a protocol for the pilot
- Setting up and testing equipment
- Developing procedures
- Carrying out training for staff and holding practice sessions

This ensured that we were well prepared for the start of the pilot period in April 2015.

### 6.2 Phase 2 – the video-link pilot

The pilot phase involved two fixed links:

#### Citizens Advice Dorchester ↔ Crossways

Initially, the Crossways Community Centre was identified as the remote site but was soon discounted when issues with the broadband speed were identified. The pilot was relocated to Crossways library.

It was agreed that clients would be able to access the video-link equipment on Wednesday mornings when the library was closed to the general public. The link thus enabled residents of Crossways to get advice by appointment from Citizens Advice Dorchester rather than travelling in to Dorchester to the main office (a distance of 6 miles, or a 20 minute journey on an hourly bus service).

Appointments were scheduled for clients following an initial 'gateway' appointment (either by telephone or face-to-face at the main Citizens Advice Dorchester office, or at an outreach location). This 'gateway' session included an initial diagnosis of the client's enquiry and identified the next steps, assessing their suitability for a video-link appointment if a follow-up meeting was needed.

Two appointment slots were made available on Wednesday mornings (10am and 12noon) for the duration of the pilot. The pilot started on Wednesday 22<sup>nd</sup> April 2015.

A volunteer was recruited to set up the equipment, welcome clients and assist them with the technical aspects of their appointment. The pilot project worked in partnership with the Dorset County Council to identify suitable individuals who had volunteered through the Digital Champions scheme<sup>5</sup> to help people get online. The volunteers were supported by the council in their volunteering role whilst also being provided with training and support by Citizens Advice Dorset. A number of issues were overcome:

- The need for a comprehensive risk assessment and a robust Health and Safety policy
- Ensuring suitable recording of individuals supported (for the Digital Champion project) whilst maintaining client confidentiality
- Development of a process for payment of travel expenses for the volunteer
- Ensuring the volunteer adhered to Citizens Advice standards of conduct and felt comfortable working with the clients

#### Ansbury (Blandford) ⇔ The Rendezvous, Sherborne

The second link was established between Ansbury (providing advice and support to young people) and The Rendezvous (providing drop-in support to young people in Sherborne).

The link thus enabled young people in Sherborne to get advice on education and work from Ansbury by appointment using the video-link, avoiding the need to travel a distance of 21 miles, (or 1½ hour journey on a two-hourly bus service).

Appointments were scheduled for clients on an adhoc basis as needs arose (with an initial target of at least 2 appointments per week). The young people were supported to use the equipment by a Rendezvous youth worker. A small number of client groups were targeted for the pilot:

- Young People aged up to 25 years
- Young people taking part in the Award Scheme Development and Accreditation Network where they met Ansbury criteria
- Year 11's about to leave school
- Single young parents

The pilot was launched on Monday 20<sup>th</sup> April 2015.

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<sup>5</sup> <https://www.dorsetforyou.com/broadband/get-involved>

## The Technical Requirements

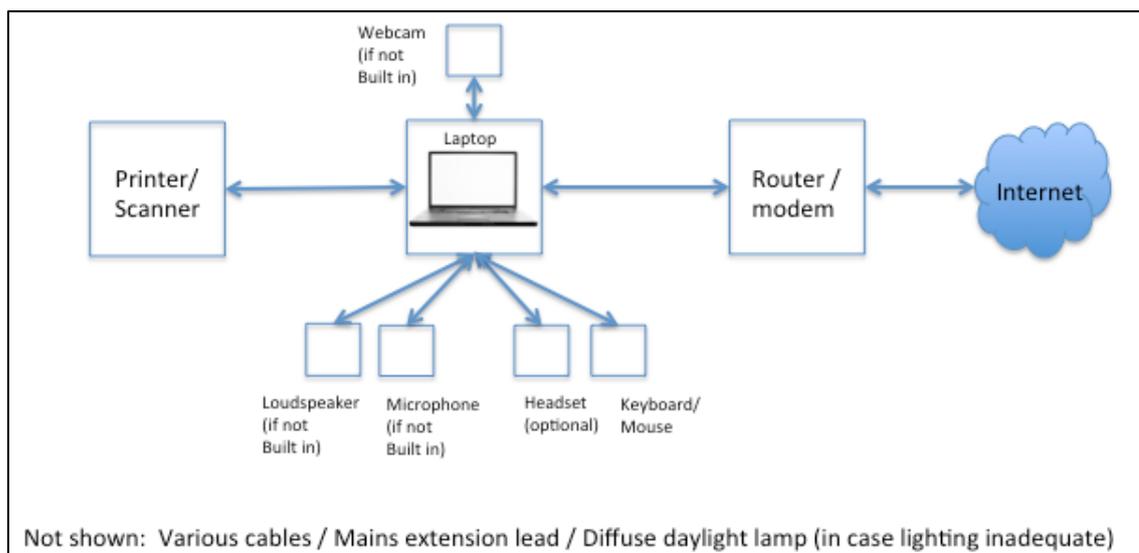
### *The Hardware*

(see [Appendix A](#) for a more detailed description)

For each end of the two links, a minimum set of equipment was required:

- A laptop capable of running the chosen video software (with built in Hi-Definition webcam & a microphone).
- A riser stand for the laptop so that the webcam is situated at the client's eye level to approximate eye contact.
- External loudspeakers with a good bass response to give good quality sound.
- A portable daylight lamp to enable good lighting
- A printer/scanner and/or document camera for the transfer of documents between client and adviser.
- A router/modem to enable access to the internet.
- A mains extension cable.

In addition, a second screen was made available for the adviser at Citizens Advice Dorchester in order to be able to use the tools available to advisers and a storage bag was required for the portable equipment at Crossways.



**Figure 1 - Equipment requirements**



**Figure 2 - Equipment set up at Crossways library**

### *The software*

A number of different software packages were considered for the pilot project, the key ones being:

Skype – freely available and widely used

Google Hangouts – at the time, under consideration for adoption nationally by Citizens Advice but not within the timeframe of the pilot project

Citrix ‘Go to Meeting’ and Cisco ‘Webex’ – subscription based services

In essence, there is very little between the software packages and a decision was made to use Skype for the pilot.

In addition, Google Drive was installed for transferring scanned documents or documents for printing. This is a cloud service which is encrypted and is quite secure. It retains documents until they are manually deleted.

### Security of video-linking

It was essential to ensure that the advice sessions taking place were secure and confidential. This included ensuring that the environment for the client was confidential as well as the software being used. Whilst the internet can never be considered totally secure, the PAB were assured that giving advice using Skype uses an encrypted video stream, although it was noted that ‘free-to-use’ systems such as Skype make money by targeting adverts to users and, in some cases, passing user contact details on to third party advertisers *Note: since the start of the pilot project, Microsoft have given public assurances that they will not do this with Skype conversations or e-mail.*

Further information about the security of video-conferencing is set out in the initial report<sup>6</sup>.

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<sup>6</sup> Access to Advice through New Technology: Technology Survey, November 2014, Credus Ltd.

### *Broadband and Internet*

One of the major concerns during the development stage of the project was the internet requirements at each end of the fixed links. The internet package provided nationally by Citizens Advice was known to have capacity issues and there were real doubts as to whether it would be possible to achieve sufficient speed and bandwidth to generate a stable video link.

Significant testing was carried out at Citizens Advice Dorchester to ensure that the video-link pilot project would not have a negative impact on their core advice service. For high definition Skype to work successfully and consistently, an upload speed of better than 1.5 Mbps was required.

The pilot project co-incided with the rollout of Superfast Dorset, a project led by Dorset County Council with the objective of enabling 97% of Dorset premises to access superfast broadband (at least 24Mbps) by end of 2016<sup>7</sup>.

### *The Environment*

For video-linking to be most effective, it is important to pay attention to the environment and surroundings. In order to maximise the audio content, the environment must be quiet without distraction or external noise. To maximise the video content, the room must be well-lit to avoid the silhouette effect. If the facial expressions of the adviser and client are not clearly visible then there is no benefit in a video-link.

### Skills and Training

From the start of the project, it was clear that some technical support was needed to help the client use the video-linking equipment and to take away any anxiety about using new technology. The required skills for the volunteer 'outreach support' were identified as:

- Capable of putting together a home computer network connected to the Internet.
- Able to carry out routine computer administrative activities (installing updates, dealing with virus checkers and firewalls, solving minor technical issues, dealing with requests to download updates etc.).
- Able to supervise the session and deal with a client who may be anxious about using the technology.
- Trained in operating the facility alone if necessary. For example, opening and closing the building, operating any alarm systems, interacting with facility representatives, trained in Health and Safety (including lone working).

Further training was provided at Citizens Advice Dorchester, Ansbury and The Rendezvous to equip staff with the skills to use Skype.

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<sup>7</sup> <https://www.dorsetforyou.com/broadband/about>

### The issues (and solutions)

A number of issues arose during the pilot, listed below with the solutions:

The speakers on the laptops had a poor bass response which affected the audio part of the video-link conversation	External speakers were purchased for each end of the link
Some clients were inhibited by the small picture of themselves in the bottom right hand side of the Skype screen	Although the picture cannot be removed or hidden, it proved sufficient to shrink the picture to a minuscule size where it is less of a distraction
The scanning process was lengthy when it involved multi-page documents	A Document camera was purchased for the Crossways library site
Transporting the equipment to and from the Crossways site became onerous and there was a risk of damage to the equipment	A storage space was found at the library so that the equipment could be stored safely and securely
Client numbers were disappointing.	A number of initiatives were put in place to promote the appointments amongst clients, and to raise aware among staff

### The results from the pilot

- 7 live sessions were held in total, 6 using the Dorchester ⇔ Crossways link, and 1 using the Ansbury ⇔ Sherborne link
- The 7 sessions that were held were all said to be very helpful by clients and some praised the calm environment that let them concentrate on the advice. None were put off by the technology.
- The video picture was lost on one occasion but the session continued with voice only and the client did not find it to be a problem.
- Staff felt the ability to use the video-link was really useful and gave them access to clients at short notice, with more effective use of time (no travel time involved)
- One client was familiar with using Skype having previously used it at home.
- The video link technology worked very well and the process of introducing it went very smoothly.

- However, the take-up by clients was disappointing despite efforts to promote the availability of the video-links. This was attributed to:
  - Citizens Advice Dorchester – alternative appointments were available in Crossways at the GP practice. In hindsight, appointments by video-link would be more in demand in areas where there is no other local access to advice
  - Ansbury – there are low numbers of young people using the Ansbury advice service in Sherborne.
- Citizens Advice Dorchester will be continuing with delivery of advice using Skype but from a different location

*Mr A had a painful medical condition that made it difficult for him to walk or move around. He was in need of advice but unable to drive or catch a bus to see an adviser at Citizens Advice Dorchester.*

*Mr A was invited to an appointment at Crossways library using the video-link. He was just able to sit in front of the webcam for 20 minutes.*

*Although he had not used this technology before, the appointment went very well and Mr A was very grateful and pleased.*

### 6.3 Phase 3 – follow up work

As the pilot phase was coming to an end, the PAB considered the next steps in order to establish video-linking as a delivery channel for advice and to share the learning from the pilot. Three actions were identified and taken forward:

- A presentation about the pilot project given to over 60 delegates at the Specialist Advice in Dorset conference on 1<sup>st</sup> October 2015. The presentation outlined the process of the pilot and reported on the results.
- Free one-off sessions made available in October and November to advice organisations working in Bournemouth, Dorset and Poole to provide support to those who wanted to explore the delivery of advice using video-linking, or using the technology to work with staff in their own or other organisations, improving efficiency by eliminating the time and cost of travelling to meetings). To date, 6 organisations have requested this support.
- A toolkit developed to include:
  - The initial guide to using new technology to deliver advice (November 2014)
  - The final report from the pilot, including technical and operational guidelines,
  - Guidelines on the conduct of video-linking for conferencing.

## **7 Our findings**

In summary:

1. We would recommend and encourage the use of video-linking both for delivering advice and to enable more efficient communication between and within advice organisations
2. Clients are quite happy to use the video-link and are not put off by the technology.
3. Reliable Broadband of suitable bandwidth is essential.
4. It is important to provide a suitable environment for both clients and advisers.
5. Providing clients with technical support is invaluable.
6. The delivery of advice using video-link works best for planned appointments rather than initial drop-in
7. Advice appointments using a video-link need to become part of the 'core-advice' and integrated into normal advice processes
8. Video-links should be used where clients or advisers are unable to travel for whatever reason or where some specialist adviser is not available locally.
9. Using video-links are not suitable where a large amount of documentation or form filling is required.

## **8 Ideas for further development**

- It is often useful in normal face-to-face advice sessions to get a third party (e.g. DWP) on the telephone landline. To do this during a video-link session would require the use of a conference phone that connects to both analogue devices (landline) and PCs (Skype). This may cost several hundred pounds but could, on occasion, make the advice session more effective.
- Having proved the concept of video-linking as a channel for the delivery of advice linking the client to one advice agency, the concept could be extended to access specialist advice and allow multiple organisations to support one client (an holistic solution). This could be:

- Using the conference facility (above) to contact another agency during an video-link appointment with a client
  - Setting up a facility to enable a client to have a video-link appointment with another agency from within the original agency. This could be further extended to having a booking system of appointments on the AdviceDorset website where participating organisations could book a slot on behalf of their client.
- A number of advice organisations work across the Bournemouth, Dorset and Poole area and spend considerable time travelling to meetings with staff located across the region. An example of this is the 9 local Citizens Advice, who are all independent of each other, but work closely together. Video-linking could be used for meetings of the 2 or more of the 9 managers, especially for short, ad-hoc meetings to discuss a single issue.
  - A considerable amount of time (and money) is also spent by voluntary organisations accompanying clients to appointments with statutory organisations. For example, staff at The Rendezvous often accompany young people to meetings with officers from West Dorset District Council in Dorchester. It is estimated that one single appointment costs £70 in staff time and travel costs. **We would strongly recommend that local authorities look at using video-linking to provide these appointments.**
  - It is clear that there are benefits to advice organisations in using new technology both to deliver advice and to work more efficiently across a geographical area. **We would recommend a package of support to help the voluntary sector to ‘get digital’, using IT and new technology to work smarter.**

## 9 Acknowledgements

Our thanks go to the following whose flexible and positive attitude ensured the success of the pilot project:

- Daniel Cadisch, Ann Evans and the staff at Citizens Advice Dorchester
- Amanda Selway and the staff at Ansbury, Blandford
- Helen Da Silva Wood and the staff at the Rendezvous, Sherborne
- Marilyn Weller and staff at Crossways Library
- Wendy Maggs and the Digital Champion team at Dorset County Council

and particular thanks to Colin Davies of Credus Ltd, whose technical knowledge and can-do approach was invaluable and gratefully received.

## 10 Appendix A – the technical requirements

Hardware required	Technical specification	Cost (at April 2015)
Laptop <ul style="list-style-type: none"> <li>• Capable of running the chosen video software</li> <li>• Built in Hi-Definition webcam</li> <li>• Microphone</li> </ul>	Acer Inspire E15 (15" screen)	£349.99
Riser Stand	Easy Riser Kensington Stand Model K60112	£9.99
External speakers	Creative A60 Speaker System	£12.99
Portable daylight lamp	Refrakta A54LC Mini SAD Light	£34.99
Printer/scanner and/or document camera	<u>Printer/scanner</u> Epson Home Expression XP-225 (C462Q)  <u>Document Camera and Magnifier Lens</u> IPEVO VZ---1 HD IPEVO	£44.99   £117.59 £15.59
Mains 4 way distribution board	SMJ Electrical 4 socket distribution board SMJ UK 9988	£4.99
Storage bag, lock and identification tags		£48
<b>TOTAL</b>		<b>£639.12</b>