

# Closing down beneficiary support projects

Learning and recommendations from  
Fulfilling Lives partnerships

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This report draws together the experiences and perspectives of staff in various roles at four Fulfilling Lives partnerships whose direct work supporting beneficiaries has come to an end. Since 2014 the Fulfilling Lives programme has supported nearly 4,000 people with experience of multiple forms of disadvantage, including homelessness, alcohol and substance misuse, reoffending, mental ill-health, domestic violence and physical and learning disabilities.

We would like to thank all the staff from the four Fulfilling Lives partnerships involved in this piece of research who gave up their time to share their experiences with us. This report would not have been possible without your knowledge and support.

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For more information about the Fulfilling Lives programme visit [www.tnlcommunityfund.org.uk/funding/strategic-investments/multiple-needs](http://www.tnlcommunityfund.org.uk/funding/strategic-investments/multiple-needs)

For more information about the evaluation of Fulfilling Lives, including partnership-level evaluations, please visit [www.fulfillinglivesevaluation.org](http://www.fulfillinglivesevaluation.org)

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## Key messages

Fulfilling Lives was always a time-limited programme, providing funding to test new approaches with the aim of informing lasting systems change. Partnerships provide direct support to people affected by multiple disadvantage and this has clearly filled an important gap. Therefore, it is crucial that partnerships carefully consider how this element of their work comes to an end.

The key recommendation from partnerships is **to start planning for the end of the project as early as possible**. Some partnerships began planning at the start of the programme. The formal close down process has typically begun 18 to 24 months in advance of the date when direct support for beneficiaries is due to end.

A **joint strategy with all core partners** is needed well in advance of closure to align expectations and ensure all partners are clear about their role. However, projects should also be prepared for circumstances to change. Building in contingency and flexibility to be able to respond to emerging challenges and opportunities can help.

Staff will begin to move on to other roles as project closure approaches. Beneficiary numbers will decline but some may need additional support with transition. **Constantly monitoring caseloads is important** in balancing demand with available resource. Do not forget to factor in the additional time that staff will need to liaise with other services in the lead up to beneficiaries leaving.

Multiple disadvantage, by definition, means people will need support and services from a wide range of other organisations. These organisations need to be aware of project closure and be involved in transition planning too. Partnerships emphasised the importance of **strong and frequent communications about service closure**, including key dates.

**Multi-agency meetings** have proved to be an effective way to engage key stakeholders in planning how beneficiaries will be supported into other services. These meetings are also valuable for identifying gaps in available support.

Focusing on **building relationships** with key decision-makers, commissioners, potential funders and champions can take time but yield results. **Making good use of evidence** of the impact of partnerships' work can also help to strengthen the case for new approaches and for the continued funding of effective support.

Services specific to the needs of people facing multiple disadvantage may be scarce. Funding to fully replicate Fulfilling Lives is unlikely to be available. **Workforce development programmes** can help to integrate the Fulfilling Lives way of working with other services and train staff to adopt similar approaches. Such programmes can help contribute to a lasting legacy and ensure that beneficiaries continue to get the help they need.

It is vital that beneficiaries are made aware of when support will come to an end and are involved in discussions and decisions about what happens next. **Progression plans, co-produced with beneficiaries**, provide a framework for the process of leaving projects and/or transitioning to other services. A gradual reduction of support may help with the transition, although some beneficiaries will need increased support to help them connect with other services.

For some beneficiaries, getting involved in opportunities to use their expertise to help others (for example, as peer mentors or researchers) can provide a valuable progression opportunity. It is important that **partnerships plan for how expert groups might continue** beyond the end of the programme and support volunteers into other roles as appropriate.

# Introduction

Fulfilling Lives partnerships have received funding from The National Lottery Community Fund for between five and eight years to both support people with experience of multiple disadvantage and improve related systems and services. The programme was always time limited, with funding to test new approaches with the hope of creating sustainable change and a lasting legacy.

Partnerships have received funding for varying periods of time. As a result, one partnership has already closed entirely and three others have ended or are currently ending their direct support for beneficiaries (other elements of their work continue for now). Other partnerships are still working with beneficiaries but this work will also come to an end over the coming months and years. There is opportunity to draw upon and share learning from those partnerships who have gone through the process of closing the direct support element of their work with partnerships who are yet to do so. This briefing offers practical tips and recommendations from partnerships to aid the smooth closure of similar time-limited support.

Learning has been gathered from the following four partnerships:

- Birmingham Changing Futures Together (BCFT): direct work with beneficiaries (Lead Worker Peer Mentor service) ended June 2019
- Liverpool Waves of Hope (LWoH): Partnership closed December 2019
- Fulfilling Lives Newcastle and Gateshead (FLNG): direct work with beneficiaries ended March 2020
- West Yorkshire Finding Independence (WY-FI): direct work with beneficiaries ended May 2020

This briefing will be of interest to Fulfilling Lives partnerships as well as other organisations receiving time-limited funding to support those who experience multiple disadvantage. It will also be useful for The National Lottery Community Fund in support of other long-term strategic programmes. However, we stress that the local context is highly influential in each organisation's decision making process. Therefore, any time-limited projects should consider their own local context and how this learning can be applied.

The briefing is structured to provide learning on the following questions about ending direct beneficiary work:

- What **internal planning and preparation** is required to close direct support to beneficiaries?
- What **external planning and systems considerations** should be taken into account when planning the ending of support services?
- **How can beneficiaries be supported** through the transition?

# Internal planning and preparation

## Start planning early

This is the key piece of advice Fulfilling Lives partnerships give for closing down beneficiary work. While it may be difficult to think about how a project will close while busy with day-to-day delivery, it is important to carve out time to consider the exit strategy. Fulfilling Lives partnerships started planning years before the proposed end date, often at the start of the programme, helping them to prepare for likely challenges. Their experience highlights the benefits of starting to consider the exit strategy as early as possible.

Partnerships have typically begun the formal process of close down 18 to 24 months before the planned closure date. Based on the average length of beneficiary support, partnerships stopped taking new referrals 9 to 12 months before closure, to avoid taking people on and not having long enough to work with them effectively. Despite having plans in place early, partnerships agree that, in retrospect, starting planning even earlier than they did would have been hugely beneficial. In particular, communicating plans for closure takes a great deal of work and time (see the following section for more detail).

You need six-months to agree the exit strategy, to develop it, to agree it and get it signed off. Then I think you need another six-months to communicate that to people... we underestimated the amount of work that was needed around comms and messaging.

## Agree a strategy with all partners

Partnerships recommend discussing closing down beneficiary work with all involved in the process at an early stage. Consulting core partners, local services, beneficiaries, lived experience teams ('experts'), funders and partnership staff helps to identify and understand their support needs as well as the potential contribution of all involved. As fixed-term contract end dates approach, staff will be looking for their next job. It is therefore important to make sure they have the chance to contribute to discussions before they leave to capture their key knowledge and learning.

Get some workshops planned in early doors, because people will obviously be leaving as soon as it becomes a reality that this is happening. I do think we've probably missed the boat on a few people, some key figures that have left, that held a lot of information. I think that would have been really useful to absolutely bleed dry any knowledge that we've got within the programme well beforehand.

Fulfilling Lives partnerships are particularly complex: they consist of multiple stakeholders and core partners spanning different sectors (health, social care, criminal justice, housing and so on) and in some areas multiple local authority areas. Planning and agreeing a shared exit strategy between all partners can align expectations, clarify roles and help ensure any gaps in ongoing support are filled as elements of partnership support close. Not having an agreed common approach can make taking a joint approach challenging.

[Our partnership] had so many different organisations with their own policies and procedures and values and beliefs. What we didn't have was, at the beginning, a joined up approach to how we were going to support the same group of people in their ending.

## Be flexible with your plans for closure

Changing circumstances, particularly in long-term programmes such as Fulfilling Lives, can mean that even carefully considered plans need to change. Building flexibility and contingency into your plans for closure in order to react and adapt to changing circumstances can help, particularly where new opportunities are presented. For example: Liverpool Waves of Hope had an overall underspend and so delayed their closure date to allow more time to support the transition of beneficiaries to other services; funding was secured in Bradford and Wakefield (part of the WY-FI partnership area) to allow a team of navigators to continue their work with beneficiaries for a further 12 months. Both of these changes required flexibility in planning to make the most of the opportunities.

## Closely monitor and adjust staff caseloads

As noted previously, as closure dates approach, staff departures within partnerships are inevitable. Ongoing flexibility and adaptation is required to ensure the continued delivery of support and transition activity with dwindling resources.

Monitoring staff caseloads has enabled Fulfilling Lives partnerships to identify and respond to capacity issues. While beneficiary numbers will reduce as people leave and no new referrals are taken, this is unlikely to happen uniformly or in line with staff departures. As beneficiaries transition into other services, there may be fluctuations in demands on staff time. The most vulnerable beneficiaries may need increased support during the transition process to make this as smooth as possible. There are other elements of planning for and closing down direct work with beneficiaries that require time and attention, even if contact time with individual beneficiaries is decreasing.

Being able to adapt as frontline staffing numbers constantly change is challenging but essential to ensure staff well-being at a time of possibly burgeoning workloads. Staff caseloads – both in terms of numbers and complexity – will benefit from being mapped out and constantly reviewed as roles and demands change. It may be necessary to reassign frontline staff to different areas or roles to help manage demand. Equally, it may be necessary to adjust the plans for transitioning beneficiaries to other support according to staff availability. For example, the rate of staff departure from WY-FI varied from district to district. In some instances staff were leaving as early as 9 to 12 months before closedown. Each district managed their caseloads accordingly; in one district beneficiaries were supported to move to other services at a faster rate than originally planned. In another district, a small team of staff and beneficiaries remained until funding was secured to continue.

Partnerships have used a wide range of data sources and methods to monitor beneficiaries' progress and help inform decisions about likely levels of support needed and to target resources accordingly. These include strategic case reviews, medication reviews, care packages, Red Amber Green ratings, Critical Time Intervention (CTI- see box on page 15), the New Directions Team Assessment (NDT)<sup>1</sup> and Homelessness Outcome Star (HOS)<sup>2</sup> measures. These tools form an important part of partnership' case load management.

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<sup>1</sup> The New Directions Team assessment or NDT assessment is a tool for assessing beneficiary need (previously called the Chaos Index). It focuses on behaviour across a range of areas to build up a holistic picture of need rather than the traditional demonstration of serious need in a specific area only. For more information see <http://www.meam.org.uk/wp-content/uploads/2010/05/NDT-Assessment-process-summary-April-2008.pdf>

<sup>2</sup> The Homelessness Outcomes Star™ is a tool for supporting and measuring change in people with multiple needs and is completed by beneficiaries with support from key workers. For more information see <https://www.outcomesstar.org.uk/using-the-star/see-the-stars/%20homelessness-star/>



### Consider bringing in specialist staff

Planning internally for the closing down of beneficiary support is a complex process that takes a great deal of thought, time and resource. Two partnerships suggested bringing in a dedicated staff member with specialist skills, specifically for closing down direct beneficiary work.

What would I have done differently? Definitely recruited for an operational manager, someone with a... load of experience that had been through shutting beneficiary work down, who had that skill set. Or even, a consultant to come in and do it.

# External preparation and systems change considerations

## Understand the local support landscape

Fulfilling Lives partnerships have filled an important gap in support for people facing multiple disadvantage. Some beneficiaries will continue to require support once partnerships have come to an end. The availability of other support can be variable and may be lacking in certain areas (either geographic or in terms of type of support provided). Fulfilling Lives partnerships observe a lack of public sector services which offer help specifically dedicated to those experiencing multiple disadvantage. Services often operate in 'silos' and, as a result, are not always sufficiently collaborative to address people's full needs. Support from voluntary organisations is limited too, but partnerships report they have been the most likely to fill gaps in support. Understanding the availability of local services, what they provide and where there are gaps helps partnerships to both plan for the transition of beneficiaries and to target systems change activity.

In addition to the challenges discussed above relating to transitioning current beneficiaries into follow-on support, some partnerships are also concerned that services may be less likely to effectively support others who face multiple disadvantage. These concerns relate to the services not having the knowledge or resource to effectively engage and support people facing multiple disadvantage. Partnerships outlined how commissioners and policy makers need to understand the importance of enabling services to work flexibly and proactively. While there is a role for upskilling frontline staff (we explore this further below) the parameters in which they work are often set from above by policy directives and commissioning decisions.<sup>3</sup>

I think [support] would be sufficient for the existing beneficiaries. The real trick is to know whether [services] will have the wit and the capacity to work with people who haven't been through the Fulfilling Lives Programme, but are presenting with the same issues.

In this section of the report we outline some of the ways partnerships have been working to create lasting change for their own beneficiaries and for others facing multiple disadvantage.

## Communicate early and often with local agencies and services

Fulfilling Lives partnerships work with a large number of organisations; planning for close-down must, as far as possible, be done with all partners to enable them to plan and be in the best position possible to respond to the closure. It is important services understand any additional responsibilities they may need to take on and are able to plan for increases in demand for services.

Partnerships being clear about when support will end and when referrals will close is an important early step.

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<sup>3</sup> See our report [Improving access to mental health support for people experiencing multiple disadvantage](#) for more information on some of the barriers to getting help.

Having a clear cut-off point of when you stop taking referrals, and communicating that to your staff and to your partners and to other services in your area, I think is key. And, start to build up that avenue of referrals.

Partnerships emphasised the importance of strong and frequent communications about service closure. One partnership reflected that once other agencies fully realised the Fulfilling Lives service would no longer be available, they began to address the situation, for example through providing funding and commissioning services to fill the gap that would be left.

Get your comms message absolutely on point, like, almost flood the system with your comms message that you're shutting your work stream down to supporting beneficiaries and be relentless with it. Be absolutely relentless in checking in with your system that they understand that you are shutting down partnership work.

Stakeholders appear to be more receptive to messages about the closure of projects and transition of beneficiaries if they are engaged early in discussions about this. It may be helpful to use a range of different communication channels to reach everyone who needs to know about closure and what comes next. Fulfilling Lives partnerships spoke with stakeholders in person wherever the opportunity arose and followed these discussions with a written outline of what was discussed.

### Focus on building relationships

Over the course of the programme, partnerships have built positive relationships with strategic leaders in key sectors. These relationships have been valuable in creating a network of contacts who understand and are supportive of the Fulfilling Lives way of working. These 'champions' play an important role in ensuring a lasting legacy for the programme; they may be instrumental in allocating funding for similar projects or instigating changes in practice in other organisations.

We have a senior person from DWP on our Strategic Group who herself has become personally invested in the programme. So, she's been with us for some time, and really understood the purpose of it. She met a number of our service users outside the Strategic Group meetings, and understood the value of working directly with them. As a consequence, she was willing not only to sanction [a pilot project], but to get personally involved in it, and to make sure that the outcomes, conclusions from it, were translated into changes in practice.

Having a relationship with other services can also be helpful in supporting the transition of beneficiaries, ensuring services understand the role Fulfilling Lives has played and are well placed to provide similar support. Services that have a prior relationship with Fulfilling Lives appear to be more likely take over providing support to beneficiaries once the programme ends.

### Make use of multi-agency meetings

Multi-agency and locality meetings have been used by partnerships to build relationships with key stakeholders and discuss the closure of support and plan what happens next.

One of the people that attended both the [multi-agency meetings] and the locality meetings was a commissioner from [local authority], and so [we were] having those conversations about what potentially funding pots we could go for.

These meetings provided a means of communicating about strategies for reducing caseloads and transitioning beneficiaries. They have also been invaluable for identifying gaps in local capacity and service provision (see above point about understanding the local landscape). Partnerships recorded comprehensive details of multi-agency meetings and sent the minutes on to attendees. Relevant services who did not attend the meetings also received the minutes.

Meetings with multiple agencies gives attendees a chance to plan amongst themselves how they will work together on individual cases. To get services to these meetings, partnerships have candidly explained the potential consequences of beneficiaries going unsupported. Multi-agency meetings ensure that a single service does not shoulder all responsibility.

A lot of services were reluctant to take on the full responsibility of someone who was very challenging or chaotic on their own, but the more they realised then that there were a lot of other services involved, there was less reluctance or they felt less responsible for that person.

Getting all the key agencies together in the same room at the same time can be a challenge. One partnership reported getting much better attendance at multi-agency meetings after moving them online as a result of the COVID-19 pandemic.

### Communicate evidence of impact and effective practice

Several of the partnerships have had some success in securing funding to continue elements of their Fulfilling Lives programmes and in persuading other organisations to adopt similar approaches. Providing convincing evidence on the effectiveness and impact of their work appears to have been a key element in this success.

Birmingham Voluntary Sector Council (BVSC – lead organisation for the Birmingham Changing Futures Together partnership) won the contract for delivering the Housing First pilot in Birmingham. In part, the evidence of the effectiveness of their Lead Worker Peer Mentor (LWPM) scheme helped win them the contract. This pilot is now underway, and the partnership has been able to refer a significant number of their former beneficiaries to the Housing First programme.

WY-FI have also been successful in securing additional funding to continue support in some areas of West Yorkshire and getting services to adopt similar approaches by proving the success of the WY-FI 'model'. They disseminated evidence of what worked at WY-FI and why through a comprehensive communications and systems change campaign. Leeds housing services and Calderdale drug services (both located in the area covered by WY-FI) have adopted a navigator model which, although not like-for-like, has allowed support workers to work with smaller caseloads and provide more person-centred support.

Communicating successes and key messages to commissioners and policy-makers is particularly important in addressing some of the more systemic barriers to effective support. It is a characteristic of the current environment that funding for interventions in the health and social care sectors is relatively short-term. Fulfilling Lives partnerships have helped influence the design and commissioning of services so they provide longer-term solutions. Demonstrating the positive impact of longer-term support appears to be an important part of influencing such change.

So in the latest round of commissioning [...] they're more inclusive of people with multiple and complex needs and they've extended the amount of time they would support people from six months to two years plus which is really positive.

### Work with services to develop their workforce

While future funding may not be available to replicate the services provided by Fulfilling Lives partnerships, through extended workforce development programmes partnerships have been able to integrate their models of working with other services and train staff to adopt similar approaches.

Liverpool Waves of Hope had a ring-fenced budget to smooth the transition of beneficiaries to other services. The funds were used by service providers to train and develop their staff to be able to work with and support the needs of specific beneficiaries. This was helpful where services were available but did not feel adequately equipped to support particular needs. The partnership reported this made it more likely other service providers would take beneficiary referrals.

there is a limited resource that will come with [the beneficiary] and that resource is to support [the service provider] to support [the beneficiary] and what we found was that made it very, very difficult for agencies in the city to say they couldn't take a referral from us as part of the closure process. And we found that worked really, really well...

Fulfilling Lives partnerships have offered training to local services throughout the lifetime of the programme and, in some instances, have continued providing training programmes after ending direct support services. Ongoing training, rather than one off courses, can refresh skills and maintain awareness of the needs of people experiencing multiple disadvantage. This is especially important for services who do not specialise in supporting this group.

Fulfilling Lives Newcastle and Gateshead's (FLNG) workforce development training offer has been delivered by their team of 'Experts by Experience', providing an authentic voice of experience that has proved to be particularly impactful.<sup>4</sup> The training is practical and tailored to the specific job staff do. This has included Psychologically Informed Environments (PIE) training. An in-house evaluation of PIE pilots by FLNG found the approach had helped workers to reflect on their practice, recognise areas for improvement and make changes to how they support those experiencing multiple disadvantage.<sup>5</sup>

In the lead up to their service closure, WY-FI curated a complex needs training suite, allowing workers from various sectors to choose modules most relevant to their work. In-house evaluation by WY-FI shows that the training has given delegates the confidence to employ a trauma-informed approach when working with those experiencing multiple disadvantage. Delegates also reported that the training has had a positive impact on service user engagement and experience.<sup>6</sup>

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<sup>4</sup> See our case study of [Fulfilling Lives Newcastle and Gateshead's Respond training](#)

<sup>5</sup> Boobis, S. (2016) *Evaluating a Dialogical Psychologically Informed Environment (PIE) Pilot* Fulfilling Lives Newcastle and Gateshead <http://www.fulfillinglives-ng.org.uk/wp-content/uploads/2016/09/PIE-report-FULL5.pdf>

<sup>6</sup> Abbott, R. (2020) *Multiple Needs Training Suite 2019/20 Impact Evaluation* WY-FI <https://wy-fi.org.uk/complex-needs-training-suite/>

Partnerships have also worked to ensure a legacy from their training. They have produced documents detailing key principles of working with those experiencing multiple disadvantage. These include: a toolkit based on Birmingham's LWPM scheme (see box below), summaries of the evidence base for what worked in WY-FI and why, and a Core Competency Framework for Complex Needs Workers<sup>7</sup> developed jointly by FLNG and WY-FI. Partnerships have sent these resources directly to contacts within local services and commissioning bodies, and shared them on their websites, by social media and through locality meetings and strategic groups.

Another mechanism to sustain the Fulfilling Lives approaches is through trained and experienced staff moving to work in other similar services. For example: many of the staff working for BCFT have now been recruited into the Housing First pilot, which approaches beneficiary care under a very similar model to that of the LWPM scheme. As these staff are already experienced in this model, there is less need to train them to effectively work with those experiencing multiple disadvantage. This also provides benefits for beneficiaries who may be able to retain familiar support workers and benefit from having support from experienced staff. Indeed, as staff moved from the WY-FI partnership to take up roles in other similar services, the beneficiaries they worked with were transitioned into those same services.

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<sup>7</sup> The Core Competency Framework can be read in full [here](#).

## **Birmingham Changes Futures Together (BCFT) – Continuation Strategy**

BCFT recognised that systems change and legacy are hugely important in ensuring their beneficiaries continue to be effectively supported. Workforce development does not need to end at the same time as direct beneficiary work.

At the end of their LWPM programme BCFT focused on delivering their Continuation Strategy. The aim of the Continuation Strategy is to ensure that the learning from the partnership is not lost, and that the Lead Worker and Peer Mentor roles can be accurately replicated in other services. While the Lead Worker role has been commissioned in the Birmingham area, the fear is that without proper guidance, staff may revert to former ways of working and not retain the distinctive elements of the Lead Worker role. Other services may not have specific Lead Worker or Peer Mentor roles, but it is hoped the resources BCFT are providing will help them to adopt some of the positive features of those roles.

The Lead Worker Peer Mentor model [...] and the impact that that had on service delivery and outcomes for those clients, was our biggest learning point and our biggest success I think [...] so we really want to use the continuation strategy to go out there and explain that model, but with a real focus on trying to increase the number of those Peer Mentor-type roles within the city...

Originally their plan was to visit services and provide in-person training on how to replicate the key principles of the LWPM programme. The COVID-19 pandemic and resulting lockdown has forced them to improvise, and they are now designing a toolkit on which services can model their own delivery. This will include blogs, podcasts, webinars, how-to guides and frequently asked questions. Staff from the LWPM team now working on the continuation strategy are acting as development officers, offering their time and expertise to services seeking to develop how they work with those experiencing multiple disadvantage.

To read more about the Continuation Strategy follow [this link](#) to BCFT's website.

# Supporting beneficiaries through the transition

## Communicate early and clearly

Partnerships were concerned that, if not handled sensitively, the closure of projects and the end of direct support could re-traumatise beneficiaries, particularly those who have been supported by partnerships for a number of years. One partnership reported that peer mentors and beneficiaries were concerned about the consequences for their health, wellbeing and recovery of losing a much-valued source of support and structure.

We're worried... What are we going to do as peer mentors and beneficiaries? I come every day to the office. [Quote from peer mentor supplied by partnership]

It is crucial to ensure beneficiaries know when the support ends and how support might change in the meantime. This will help them mentally prepare for life after partnership support and adjust to changes as they arise.

I think it's just clear communication and not setting them up to expect that there's going to be never-ending, open-ended continual support

Fulfilling Lives has offered high-levels of support to beneficiaries, often for as long as needed. Giving beneficiaries plenty of notice and reducing support levels gradually can help with preparation for the transition out of the programme.

Winding it down as the weeks and months went on, was really good preparation for [beneficiaries] so they didn't feel like they were just left high and dry by the end of the project.

However, partnerships also highlighted that the most vulnerable beneficiaries may need additional support to manage the transition into other services. As with all other aspects of support, help with transition needs to be tailored to the individual.

For the six [beneficiaries] that we identified that needed a lot of wrap round support, we really, really did ramp up our efforts in making sure they were plugged in to the right services

## Create a progression plan

Partnerships entered the final year of support with a clear plan, co-produced with each beneficiary, with aims for what each individual wanted to achieve before they leave the programme. This plan needs to be realistic within the remaining time before support is due to end. Starting the progress plan early helps beneficiaries to create a long-term plan which they can achieve whilst receiving Fulfilling Lives support.

Progression plans may include, for example, the opportunity for beneficiaries to join their lived experience expert network, or get involved in activities like street or peer research. Partnerships suggest this can be valuable in the process of 'tapering down' support, as this type of activity helps to develop independence. For some beneficiaries, progressions plans may focus on transition into education and/or the labour market. For example, WI-FI's



Employment, Training and Education (ETE) plans to help beneficiaries visualise and prepare for progression beyond support from Fulfilling Lives.

[Beneficiaries] have been offered a one-to-one interview with the ETE team to look at how they might want to move on and progress whether it's through looking for employment. For example, somebody went to work on a building site, whereas others wanted to do peer mentoring and go into services to maybe give something back.

Once a plan for post-Fulfilling Lives support was agreed, partnerships spent time introducing beneficiaries to workers who would be supporting them in the future. Familiarisation has been key to mitigating any anxiety involved in transitioning, for both beneficiaries and services. Multi-agency meetings, where services are brought together to discuss individual beneficiary support plans and preferences, have been used as a forum for these introductions (see also pages 11-12 for further information on the role of multi-agency meetings). Partnerships also provided organisations supporting beneficiaries an exit letter detailing their responsibilities towards the beneficiary at the end of the programme.

One partnership provided a service user hub: a safe place to socialise with other beneficiaries and connect with their support workers. Recognising the need for something similar to continue but with limited resource available, the partnership piloted a women's only drop-in. This is now run by a separate organisation. Being able to refer beneficiaries to support that is in a format that beneficiaries have been used too has eased the transition for some members of the service user hub.

### Involve beneficiaries in transition planning

Beneficiaries are best placed to know what they will need once partnership support stops. Including them in conversations with services, such as in multi-agency meetings, is important in helping them to shape their own exit strategy.

Say, if you had Substance Misuse Service in the room, you had a probation worker, an accommodation provider and a community psychiatric nurse in the room. They might put forward suggestions and at that point, the client can say, 'No, actually this is what I want. I don't want to just go on methadone. I want to go into detox.' And then we could all plan how that could happen

Some beneficiaries may not wish to attend multi-agency meetings. Where this is not desirable or possible, open communication and one-on-one discussions with beneficiaries around transitions should still take place. To enable their voice to be heard, staff or peer mentors, for example, advocate on their behalf and feed their views and preferences into meetings.

Supporting beneficiaries to consider their own futures is thought to help build their independence and reduce any anxieties associated with reduction of partnership support.

We take them through almost like a reflective process, if you like, of them setting their own goals, working out how they've met them and what they want to achieve next

As the Fulfilling Lives programme works in a person-centred way, this type of involvement will likely be in place. However, it is important to ensure that this approach is retained when

undertaking wider transition planning work despite the potential for resources to be stretched as the transition itself comes closer.

Critical Time Intervention (CTI) is an evidence-based model that can be used to support people facing multiple disadvantage during a period of transition.<sup>8</sup> It incorporates many of the points outlined above. The model was piloted by Fulfilling Lives Newcastle and Gateshead. Their experience and learning is summarised in the box below.

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<sup>8</sup> <https://www.criticaltime.org/cti-model/>

## **Fulfilling Lives Newcastle and Gateshead (FLNG) – Critical Time Intervention pilot**

Based on an American model, Critical Time Intervention (CTI) is a nine-month practice that guides people during transition periods. FLNG aimed to pilot CTI with 35 of their beneficiaries to build their independence, create person-centred goals and increase their support networks to aid transition on from Fulfilling Lives support. Support is provided over three stages:

- Transition – providing support to explore new sources of support
- Try-out – building up support networks and skills
- Transfer of care – closure of the case and celebration of reaching the end of support.

FLNG used a pre-CTI assessment to determine whether individual beneficiaries were at a point in their recovery where the reduced contact time associated with CTI would suit their needs. CTI worked better for beneficiaries who had been receiving support from the partnership for a few years and had already achieved some stability, especially men.

We've found particularly that CTI worked well for men who'd already had a level of stability in their lives [...] We worked with a gentleman who his goal was around getting a driving licence, which he did achieve and, as his CTI came to a close, he actually had employment, which is quite rare for the group of people that we've worked with.

Those who had particularly acute experience of complex trauma and were less well established in their recovery did not respond as well to CTI and were placed back on the navigation model. FLNG also found that the model did not work as effectively for women because of the need for longer term support tailored to women's needs.

Workforce development findings highlighted challenges for staff who were accustomed to the navigator role but were also asked to develop the different set of skills required for the CTI model.

What we should have done is split the team and had a group of [staff] that were just focusing on CTI and a group that were just focusing on navigation [...] You couldn't really have two concurrently running together, it's quite hard for practitioners to run two ways of working.

The CTI principles of incrementally decreasing contact with beneficiaries and nurturing independence are applicable to any time-limited project. However, to be effective it requires both skilled staff and the availability of appropriate support to transition people into. From their evaluation FLNG conclude that CTI is most appropriate as a targeted intervention for those who meet the criteria for success rather than everyone experiencing multiple disadvantage.

The FLNG evaluation of their CTI pilot can be read in full [here](#).

## Consider the role of expert groups

Although not the main focus of this report, several interviewees touched on transition planning for their expert groups.

Fulfilling Lives partnerships provide many opportunities for people with lived experience ('experts'), including ex-beneficiaries, to volunteer with them. This allows people to develop their skills and confidence, gain work experience and use their experience to help others – for example, as peer mentors or peer researchers.

Support for expert groups is continuing after direct beneficiaries support has ended in two of the partnerships we spoke to. Expert groups provide an excellent progression opportunity for some beneficiaries. They also provide a valuable source of expertise to inform the co-production of services. So it is important to consider how these opportunities can continue beyond the lifespan of the Fulfilling Lives funding.

Partnerships have developed relationships with other organisations in their area who provide volunteer opportunities. Volunteers can increase capacity and organisations know that experts who have been working within Fulfilling Lives partnerships have received training and experience that make them valuable assets. All partnerships reported that their experts, including peer mentors, had been able to move to other local opportunities within the sector.

By the end of it in [city], we'd moved our peer mentors on and we didn't have a very big co-production link [...] with peer mentors it is not hang on to them right to the end but try to make sure that they were steered into other areas of work

Partnerships are also looking for opportunities to embed their expert groups in other longer-term projects, where they can contribute but still receive necessary support.

As with the transition for beneficiaries, it is important to involve experts in discussions around how their group and work will move on.

We have another two years of funding to work with our Experts by Experience, and we have worked with them to, really start upskilling them about, what will legacy look like for them? [...] We're constantly having conversations about who do we engage and how are we going to recruit more into the expert group?

However, moving on to different organisations or services, in either a voluntary or paid role, may mean an unfamiliar environment with different practices, policies and procedures to adjust to. Experts may need support with this. This may involve working individually with experts to upskill them ready for a new role, but equally, working with organisations to ensure that they are ready and able to work with experts. Where Fulfilling Lives partnerships have been developing the workforce locally, and services have adopted learning from this, the transition is likely to be less problematic. For example, in one area other organisations have adopted a peer mentor model and taken learning from the Fulfilling Lives partnership to implement this. Fulfilling Lives peer mentors can move on to other services in the sector with the same model and both experts and employers know what was expected of the role.

See also our [2017 Annual Report](#) which includes chapters on managing caseloads and supporting beneficiaries to successfully move on from the programme.

## About this research

This briefing is based on telephone interviews with 14 staff from four Fulfilling Lives partnerships (Liverpool Waves of Hope, Birmingham Changing Futures Together, West Yorkshire Finding Independence and Fulfilling Lives Newcastle and Gateshead).

Staff members interviewed included programme leads, evaluation leads and other managers and frontline staff. They were recruited on the basis of their knowledge of the close-down process within their partnership.

The interviews were conducted between December 2019 and June 2020 as the four partnerships concluded their direct work with beneficiaries.

## About Fulfilling Lives

The National Lottery Community Fund is investing £112 million over 8 years (2014 to 2022) in local partnerships in 12 areas across England, helping people with multiple needs access more joined-up services tailored to their needs. The programme aims to change lives, change systems and involve beneficiaries. The programme is not a preventative programme, but instead aims to better support those with entrenched needs who are not otherwise engaging with services. The programme uses co-production to put people with lived experience in the lead and builds on their assets to end the revolving door of disjointed care for adults. The programme also has a strong focus on systems change, so that these new ways of working can become sustainable.