

Charnwood Connect:
Holistic knowledge management for building resilience in the voluntary sector
by
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Abstract

Charnwood Connect, funded for two years by the Big Lottery Advice Services Transitions Fund, was designed in response to changes in UK social welfare and housing policy. It aimed to encourage voluntary and public sector organisations to work together to achieve more for clients and service providers by adopting an integrated model of best practices in knowledge management. The project was led by Citizens Advice Charnwood and The Bridge (East Midlands); an additional eight advice agencies within the locality were included.

The project was underpinned by knowledge management principles with particular emphasis on successful knowledge sharing between the project participants as well as with their clients. A holistic approach was taken, with attention paid to both technical and social aspects. The former was primarily addressed by the development of an IT Knowledge Hub and the latter by the creation of The Forum. Given that project participants had previously been in competition for funding, a key challenge was to support the building of relationships and trust - over time, there was an increase in mutual awareness and respect about the work of different partners that accelerated improvements in collaboration and in achievement of the project aims.

A host of evidence has been gathered to demonstrate Charnwood Connect's impact. The project leaves an important legacy and is increasingly recognised and promoted in discussions with funders, decision makers, including Members, and policy makers. Availability of the IT Knowledge Hub has demonstrated the value of locality based online platforms as important resources for empowering communities and creating better access to advice services. The Forum continues to be a valuable vehicle for building communities of practitioners, sharing knowledge and collaborating on issues of concern for clients. Finally, a business and strategy plan, with a shared vision for transforming Charnwood Connect from a project to a partnership, has recently been signed off, demonstrating commitment to carrying forward the ideas and initiatives already tested and implemented, and creating scope for further developments.

Introduction

Advice services play a valuable role in ensuring people are well-positioned to make informed choices and decisions that enhance their health and wellbeing. The public and voluntary sectors make an important contribution to the provision of these services. Over time, particular provision and specialist knowledge has become associated with specific agencies, and individuals have been able to access it accordingly. It has, however, become challenging for the demand to be met. Increasingly, individuals are accessing services at times of crisis, perhaps when they are at serious risk of becoming homelessness, on the edge of bankruptcy or while coping with escalating mental health issues. In addition, since crises are not neatly packaged, there is a growing need for individuals to draw on the knowledge of multiple agencies. So, there is a need to design a more efficient and effective way of ensuring that support is offered in a timely and joined up manner.

The case study described in this chapter was an ambitious, innovative and strategic intervention in the Borough of Charnwood that was designed to place the individual (the client) at the centre of the advice provision journey and, simultaneously, achieve 'more for less' at a time when there were cuts in the funding of public and voluntary sectors. As will be seen, the approach embraced knowledge management principles and was a significant development of previous collaborative work between Loughborough University and a single advice agency (Ragsdell, 2009).

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Context

Charnwood is the largest borough in Leicestershire, UK, with a population of around 180 000 people; it was formed in 1974 and has the town of Loughborough as its administrative centre. The project described herein, Charnwood Connect, builds on the success of well-established advice providers in the Borough to promote, as the name suggests, ‘a joined-up’ approach. Spearheaded by Citizens Advice Charnwood and The Bridge (East Midlands), the two-year project brought advice and advocacy services in the area together into collaborative service provision. Showcasing an integrated model of best practices in knowledge management, Charnwood Connect was designed to offer a seamless experience for vulnerable people who need efficient and effective information services.

Despite the best efforts of all parties, in 2012 advice provision in Charnwood was, unfortunately, not meeting demand. All ten partners within Charnwood Connect were struggling to reduce substantial waiting times for advice services; this was a key trigger for the project and the application for funding to UK Big Lottery’s Advice Services Transitions Fund. It was also clear that the demand would not subside. A robust evidence base showed that complaints about homelessness services were up 14% nationally, enquiries around welfare benefit had increased by 25% locally, and enquiries around debt had grown by 80% locally. It was also predicted that this trend was likely to continue with the significant changes contained within the Welfare Reform and the Legal Aid, Sentencing and Punishment of Offenders Acts.

With an ever expanding demand for advice, there was a need to reshape and re-organise services. Charnwood Connect was designed in recognition of, and in response to, these challenges in social welfare and housing policy as summarised in Figure 1, notwithstanding the additional challenges brought about by significant cuts in funding.



Figure 1: Summary of the challenges of the social welfare context and responses from Charnwood Connect

The funding application was successful and Charnwood Connect was launched on 1st October 2013 with financial revenue to cover two years of activities. The near – term aim was to make the best use of resources in an environment of funding cuts and statutory service restructuring. The longer – term aim was to enable the Borough of Charnwood’s voluntary and community sector to become more resilient and better equipped to meet future needs, with more modern and enterprising business models, and more diverse sources of funding – a knowledge management model was a major contribution to this aim.



Figure 2: Charnwood Connect Partners

So, Charnwood Connect developed a partnership between organisations from the voluntary and public sectors, and encouraged partners to work together to achieve more for clients and service providers by improving the way services and initiatives were coordinated. Collaboration and effective knowledge management, with an emphasis on knowledge sharing, were central to the project's success.

Specific objectives of Charnwood Connect

Charnwood Connect's overarching aim of building resilience into advice provision across the locality was to be achieved by four distinct, but joined up, objectives. The development of a multi-faceted bespoke Knowledge Hub was a core objective of Charnwood Connect and is the focus of discussion herein. There were two distinct areas to the Knowledge Hub. One aspect was to support practitioners in terms of specialist learning, policy and procedural updates, and legislative updates – The Forum. The second aspect – the IT Knowledge Hub - was a client facing resource to include information on all available services within the locality, access to online advice and information resources, and information about referrals and signposting. So, the Knowledge Hub appreciated both codification and personalisation strategies to knowledge management. It was a cornerstone to the project since it supported, both explicitly and implicitly, Charnwood Connect's other three objectives of:

1. Prevention, advice and specialist support - Charnwood Connect will offer an empowering service. The aim is to enable people to take control of their lives by offering advice, information and support on social welfare law.
2. Education, training and enabling - Charnwood Connect will offer a financial education training programme giving skills, knowledge and confidence to enable people to make informed decisions regarding the use and management of money.
3. Volunteering - Volunteering is an effective pathway to employment. Charnwood Connect will build upon and develop the successful volunteering model which is delivered by CAB. This will contribute to ensuring that Charnwood Connect can meet the ever increasing demands for frontline service delivery.

The infrastructure

In keeping with contemporary perspectives of knowledge management, a holistic approach was adopted throughout Charnwood Connect.

While all partners and participants were essential to the steering and support of the project, early recruitment of a Knowledge Management Officer (KMO) was fundamental to deliver the core objective of designing and implementing a Knowledge Hub. As is seen in the KMO job advert (Figure 3) there was open acknowledgement of the benefits of emphasising the need to manage knowledge as an asset and to manage social processes in which knowledge is embedded. Finding an individual who had the skills, understanding and ability to fulfil this stated requirement was ambitious but, fortunately, was achieved. An incentive of part-time PhD study based on insider action research was readily accepted by the post-holder and secured an additional legacy for the project.

Knowledge Management Officer - Key work areas and tasks

IT Knowledge Hub and Forum:
 Develop and maintain an electronic resource for partners and clients
 Work closely with the web design team to ensure relevant and up to date content is included and accessible in the electronic resource
 Introduce the use of social media to partners and users to support knowledge sharing practices.
 Provide support at meetings, workshops and training events.

Knowledge Sharing:
 In conjunction with the management team, formulate and implement CC Knowledge Management strategy
 Develop a knowledge culture (including promoting open communication, collaboration and knowledge sharing) between partners through methods such as knowledge forums and workshops so as to trigger the formation of a community of practice.
 Facilitate the sharing of best practice, know-how and expertise between partners
 Capture and document best practices of partners to enable dissemination of findings to local and national information providers
 Establish strong relationships with all stakeholders to identify information and knowledge requirements
 Be a catalyst in making things happen. Balance analysis with action!

Evaluation and Monitoring:
 Monitor and report on the impact of the knowledge management strategy using quantitative and qualitative indicators.
 Benchmark the knowledge management strategy and feedback on progress to Project Manager and to relevant parties in verbal and written format as required.
 Provide written and verbal reports on progress to the line manager.

Figure 3: Key tasks for the Knowledge Management Officer

The Knowledge Hub comprised of a technology-centred element – IT Knowledge Hub – that complemented a human centred element known as The Forum. In keeping with meeting the needs of as many stakeholders as possible, these elements were designed to serve both clients and practitioners; there was commitment to genuine participation from them in the design process.

The functions of the IT Knowledge Hub are shown in Figure 4. In addition to client involvement, out of necessity a specialist IT and web design organisation was commissioned to move the design concept into a practical tool. The ethos of the organisation aligned firmly with that of Charnwood Connect and this was a key consideration in the selection process.

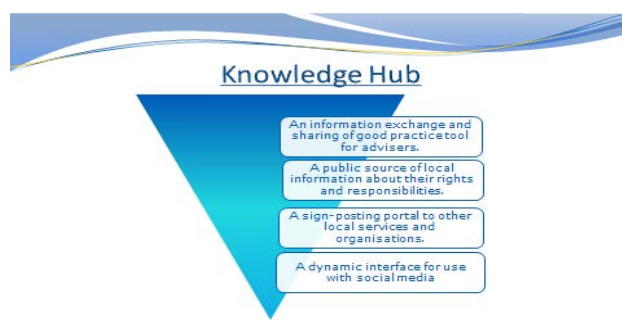


Figure 4: Functions of the IT Knowledge Hub

Alongside the development of the IT element, The Forum was established at an early stage of the project with quarterly meetings taking place within the locality. It was a valuable platform for building communities of practice in which knowledge was shared and there was collaboration on issues of concern to clients. In the spirit of the cultivation of such groups, The Forum elected from amongst its number, a chair and vice chair, and agendas were agreed by the partners.

Challenges

Charnwood Connect was an ambitious, cutting edge project; it was pioneering with respect to the processes it promoted – i.e. knowledge management practice - and with respect to the context of operationalisation – i.e. the voluntary sector. So, it was not surprising that a host of challenges were encountered; examples are shown in Figure 5.



Figure 5: Key challenges for Charnwood Connect

Advice services provision is, without doubt, knowledge intensive yet, prior to Charnwood Connect, knowledge management was not overtly practised within any of the project partners. Rather, knowledge management was intuitive and implicit *within* partner organisations. Limited, if any, knowledge sharing was occurring *between* partners. While business models and theories are used in the management of voluntary sector

organisations, their origins may restrict the extent to which they can capture the purpose, charitable nature and ethos of organisations beyond those which are profit making – the holistic and critically reflective manner in which knowledge management principles were applied, negated this possibility in Charnwood Connect.

The context for this application of knowledge management and the cultural challenges that it brought were more difficult to manage. There were practical and conceptual obstacles. From a practical perspective, although the long term benefits of the project were appreciated by partners, it was inevitable that the day to day urgency to support clients in desperate need of help sometimes reduced their capacity to contribute to Charnwood Connect. This was the nature of the environment of the project. Additional practical challenges related to the complex particularities of client groups and the need to adhere to data sharing protocols; none of these challenges were insurmountable but they did consume resources in an unanticipated way.

Although there were other cultural differences between partners, the conceptual obstacles were largely borne out of the competitive nature of funding within the voluntary sector. Prior to Charnwood Connect most partners regularly entered the same competitive tendering processes; all required funding to secure core posts and there was a limited 'pot'. So, moving the mind-set of partners from one of competition to one of collaboration was a huge challenge, but was a necessary conceptual transformation for the success of the project.

Benefits for the Borough of Charnwood

Charnwood Connect had a robust overall measurement framework in place which engendered a culture of continuous improvement and shared learning across the partnership. The holistic theme was followed in this aspect as exemplified by the methods that were included:

1. *Data Collection* - a comprehensive client database which recorded the socio-economic make up of clients together with presenting issues and outcomes achieved
 - Quantitative Outcomes included: Number of clients, Number / type of enquiries, Number of volunteers recruited and trained, Number of training events.
 - Qualitative Outcomes included: Greater confidence through advice or training, Better health and wellbeing, Enhanced social and economic inclusion, Effective knowledge sharing, Quality audits
2. *Feedback* from volunteers, clients and partners about their training and experiences. In particular volunteers kept a learning journal and interview log; case studies illustrated what differences had been seen, and feedback was invited from participants on training events.
3. *Quality Assurance* through client satisfaction surveys, case file reviews and 'peer review' audits with partners
4. *Quarterly monitoring reports* to trustees and partners at network meetings

Given the variety of monitoring and evaluation tools in place, it was relatively straightforward to track how the project was received. Since its launch on 29 September 2014 and 9 September 2015, according to Google Analytics, the IT Knowledge Hub had 4 855 visitors. 24% were returning visitors and the remaining 76%, new ones. The Hub training also met with very positive feedback, providing an opportunity for volunteers/staff already in post to learn about each other's roles and agencies; and to use this knowledge and the Hub resource to better inform and signpost clients. Similarly, the quarterly meetings of The Forum proved to be a useful platform for face2face networking, training, exchanging knowledge, sharing expertise and taking joint action on social welfare issues.

With respect to the other elements of Charnwood Connect that were enabled by the Knowledge Hub, a multi-agency volunteering model was developed and implemented that resulted in the recruitment and training of new volunteers for Charnwood Connect partners. Overall 70 volunteers participated in the training programme, and 61 were recruited. The 61 volunteers recruited across the partnership over the 2 year period have provided an estimated 15,500 hrs, giving a total economic value of almost £250,000. Feedback from both

volunteers and participating agencies has been overwhelmingly positive. Volunteers have appreciated the range and depth of preparation provided for volunteering in terms of skills development, understanding what it means to be a volunteer, understanding the partner agency services, enabling self-assessment and building confidence. Partner agencies have appreciated a process that better prepares volunteers, builds commitment and provides relevant skills/knowledge training for the roles they undertake.

Finally, at a time of severe funding cuts and increasing demand for advice services, Charnwood Connect brought a more effective and efficient use of advice appointments. Initiatives that had been triggered by knowledge sharing between agencies had reduced waiting time by 20% and decreased non-attendance to agency appointments by 15%. In addition, appointment reminders by text have become the norm for at least two partners helping to reduce 'no shows' to around 18% and the waiting time from initial contact to a specialist appointment has been further reduced from eight working days to five.

Benefits for the clients

In addition to the benefits that Charnwood Connect has brought for the Borough of Charnwood, a variety of examples of personal benefits have been realised as illustrated in the client story below.

HOUSING ADVICE CLIENT STORY

Jim approached our service because he had succeeded the council tenancy of his partner following her death. He had lived at his home with his partner for over 50 years and had raised his daughter at the property, who had lived there for all of her life.

Following succession, a council can seek possession of a property if it is under-occupied, where the successor is not the spouse of the original tenant and where a suitable alternative offer of accommodation is made available.

The Local Authority had sought possession of the home as it was a 3 bedroom house with only 2 persons living there. This was most distressing to Jim and his daughter as the property had been their family home.

We assisted Jim to present his case to remain in the property to the council. Though Jim and the original tenant had not been married, they had effectively lived at the property for 50 years as 'man and wife' and the right to seek possession against a long term co-habitee was untested in the courts. We argued that the courts must give consideration to whether it is reasonable to order possession giving consideration to:

- The age of the successor
- The length of time the property had been occupied
- Any financial support given to the previous tenant by the successor

We assisted Jim to obtain relevant evidence from his GP to support his family's need to remain in their home. Due to our intervention, the Local Authority decided not to proceed with the possession action against the family and they were allowed to remain in their home. Jim was extremely happy with the outcome and informed us that he felt like he had 'won the lottery!'

JIM

Figure 6: An example of a client story (The Bridge Annual Report 2015/2016)

The client story describes the impact that the work of a Charnwood Connect partner can have on an individual accessing advice services in the Borough of Charnwood. However, in addition to this, Charnwood Connect brought about a simple, yet fundamental change to how inter-partner referrals were managed and processed.

Charnwood Connect partners introduced the concept of 'one-front-door', also known as 'no-wrong-door', to manage enquiries for advice from the public and to better manage referrals between Charnwood Connect partners. The concept involved a standardised 'Common Registration Form' to be completed by a client, upon approaching one of the Charnwood Connect partners. Using this form, information was collected by all

partners and negated the need for a client to repeatedly provide their information should they need advice from another partner within Charnwood Connect.

In terms of the inter-partner referrals, the process is managed by the advisor, with the aim of reducing any additional pressure or concern for the client; in practice, this means that the advisor would make an appointment for the client with another partner. For example, if The Bridge sees a client for housing advice, but recognises that the client needs more in depth debt advice., then the advisor at The Bridge would make an appointment with Citizens Advice Charnwood and provide all relevant information about the client and the type of advice needed. They would also appraise the other partner with all information on the Common Registration Form. This joined up way of working with information and knowledge, took away any challenges from the client in having to re-tell their history - in some circumstances this can be emotionally difficult for them.

Achievements and learning outcomes

Charnwood Connect is a case study of successful implementation of a knowledge management strategy in a sector with extreme operating conditions - uncertain resources, a transient (volunteer) work force, and clients who are often at crisis point. It was an ambitious project that was underpinned by a holistic model of knowledge management. There has been a plethora of learning outcomes from the Charnwood Connect project; not only for the individual partners, but also for the voluntary sector in Charnwood and beyond. The project has also generated insights for academics and practitioners in the knowledge management arena – including those with an interest in the public and private sectors. It has also brought a host of successes as shown in Figure 7.



Figure 7: Key successes for Charnwood Connect

The focus herein has been on the explicit core knowledge management objective of the development of a Knowledge Hub, with emphasis on both the technical and human aspects. It was indeed a key success: the establishment of a client-friendly IT Knowledge Hub provided local people with direct access to locality-based information. The human part of the Hub, known as The Forum, has established a local community of practice – a practitioners’ network for knowledge sharing and joint working.

Through joint working on tangible outputs such as the Hub (but also through training and the volunteering pathway) there has been unprecedented relationship and trust building across a diversity of advice, information and support services. Charnwood Connect has increased mutual awareness about work of the different partners as well as other local agencies. This was a culture change that led to the testing out of new ideas such as the Common Registration Form, as described earlier, and My Charnwood Connect Card to improve inter-agency relations and access to local services as well as the development of a pioneering multi-agency volunteering pathway resulting in an injection of new volunteers to undertake advice, information and support work.

Plans to develop the initiative

The Project Steering Group, The Forum, Project Team Meetings, information networking and promotional activities have helped, and continue to help, share the outcomes of Charnwood Connect, extend reach and

build relationships. This is the case at a local, national and international level. Charnwood Connect is seen as a strategic vehicle for consolidating the voluntary and community sector and, as a brand, it is increasingly recognised and promoted in discussions with funders, decision makers and policy makers.

A business and strategy plan with a shared vision for transforming Charnwood Connect from a project to a partnership has been signed off demonstrating partner commitment to carrying forward the ideas and initiatives that have already been tested and implemented, and creating scope for further developments.

The availability of the Hub has demonstrated the value of locality based online platforms as important resources for empowering communities and creating better access to advice, information and support services. Understandably, limitations in resources have led to a prioritisation of activities meaning that, at present, The Charnwood Connect Forum will continue to be supported as a valuable platform for sharing knowledge and collaborating on issues of concern. In addition, business planning training and support has been put into place to build the capacity of partners to prepare funding bids, collectively and individually.

Summary

Charnwood Connect is a holistic approach to knowledge management that has brought positive change to a region of the UK – to people and organisations within the Borough of Charnwood – and the way in which public and voluntary sector organisations in the Borough address their clients' needs. The project partners have overcome significant challenges associated with integrating technical and social aspects of knowledge management. In particular, Charnwood Connect has triggered and sustained a culture change within the sector from 'competition' to 'collaboration' and, in doing so, has increased resilience. The public and voluntary sectors are quite rare contexts for knowledge management studies. Sadly, cuts in funding in these sectors are a reality in many countries. This case presents an innovative approach to dealing with that reality - there is, thus, much that both knowledge management academics and practitioners across the globe can learn from Charnwood Connect.

References

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Biographies



Moya Houlton was Chief Officer at Charnwood CAB for 18 years until she retired in March 2016. Moya worked in advice and information services and held strategic and managerial positions in both the public and voluntary sectors. She led many successful projects and initiatives promoting collaborative and partnership working.



Peter Davey, Chief Officer, has undertaken work for a diverse range of organisations including the RNLI and Citizens Advice. He has led The Bridge for 15 years. Peter has a strong track record for collaborative working and has been involved in developing a number of high performing partnerships across Leicestershire.



Gillian Ragsdell is Reader in Knowledge Management in the School of Business and Economics, Loughborough University and Coordinator of the Knowledge Management Research Group. She has collaborated with a wide variety of organisations and recently successfully completed a Royal Academy of Engineering Industrial Secondment in the energy sector.



Paul Snape, Business Development Manager, has 16 years' experience of service delivery, project management and strategic leadership roles. Paul leads on developing tenders, grant and trust fund applications, improving The Bridge's fundraising capacity as a team and exploring new opportunities for income generation through partnerships, social enterprise and community fundraising.