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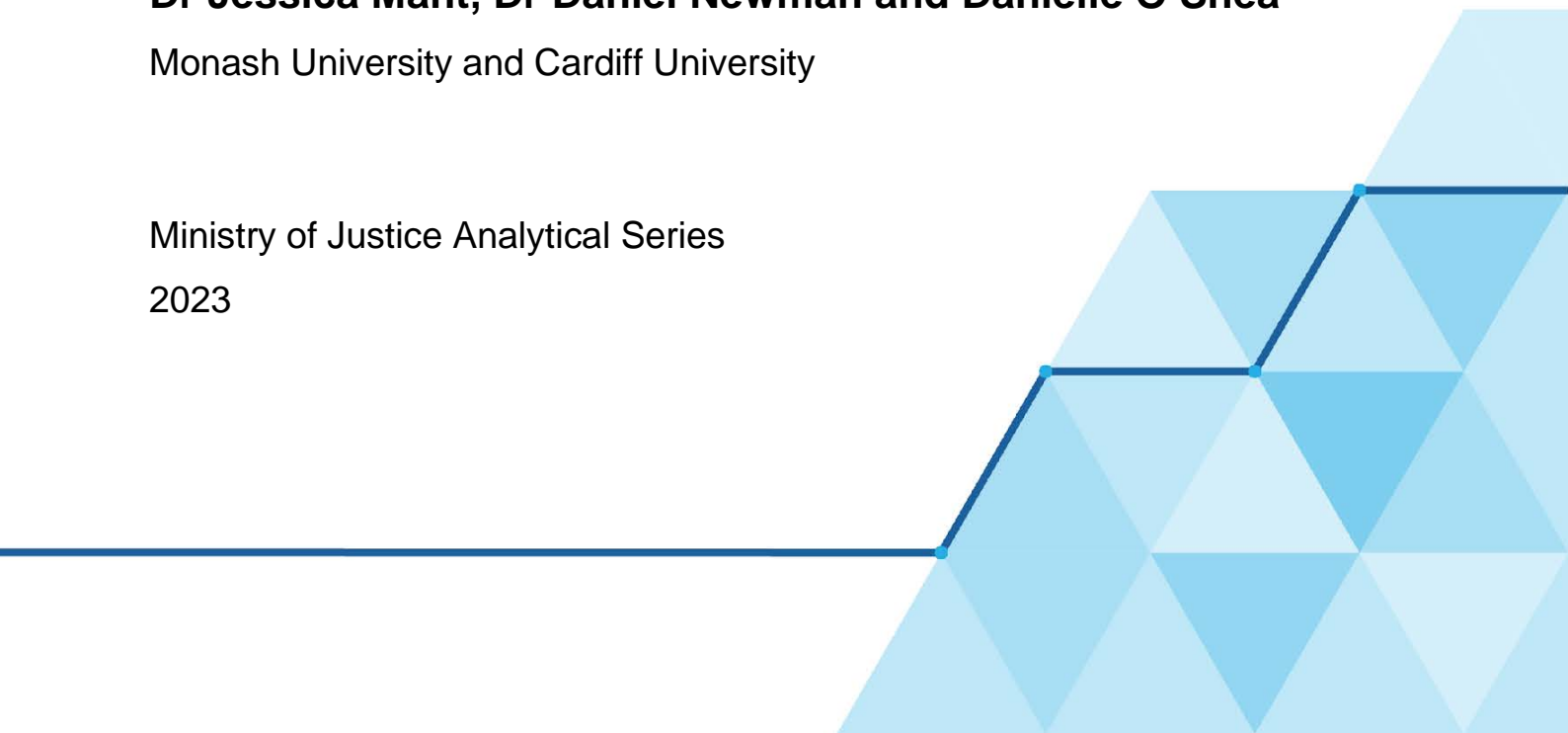
Blended Advice and Access to Justice

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Finally, our deepest thanks go to the individuals who trusted us enough to speak openly about their experiences of facing legal problems and trying to solve them. Your experiences are invaluable to the future of access to justice, and we hope to have gone some way towards inspiring others to seek out service users' perspectives, as those materially affected by such issues.

Dr Jessica Mant, Dr Daniel Newman and Danielle O'Shea

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Executive Summary

This report presents the findings of the first empirical investigation into the emergence of ‘blended advice’ after the COVID-19 pandemic. Blended advice, sometimes referred to as ‘hybrid advice’, refers to models of advice delivery which involve providing legal advice through some combination of face-to-face interaction and remote communications. Importantly, there is no single model of blended advice provision. Rather, there are various strategies for determining when and how different formats might be used at different stages of the advice process.

With financial support from the Legal Support for Litigant in Person (LSLIP) grant, provided by the Ministry of Justice and administered by the Access to Justice Foundation, the purpose of this research project was to qualitatively explore how these blended models have emerged and developed over the course of the pandemic within three areas of law: debt, housing and welfare benefits, between March 2020 and March 2022. These were selected as areas of focus as these are areas of social welfare law that tend to cluster together and issues that increasing numbers of people are seeking support for during the pandemic.

The findings presented in this report are drawn from focus groups and case studies with advisors working on the frontline of advice provision across these areas, and interviews with clients who received blended advice during the pandemic. The findings provide specific insight into how advice organisations have responded to the pandemic by innovating with blended advice models. In addition to identifying examples of models that are currently being used, the findings provide a variety of perspectives about the efficacy of blended advice for helping people to resolve debt, housing and welfare benefits problems, as well as the potential challenges and opportunities associated with an increased reliance on blended models in the future.

Key Findings

The range of blended advice models being used by advisors has expanded throughout the pandemic. At the initial outbreak of the pandemic in March 2020, advice organisations were required to rapidly shift towards fully remote models, before gradually developing blended models as it became possible to reintroduce face-to-face interactions. This context was ever-shifting and unpredictable, and advisors found themselves needing to develop models that could operate flexibly depending on the circumstances of the client, the client's legal problems, as well as the broader constraints of the pandemic.

Combining face-to-face and remote communication has several logistical benefits for organisations and their clients. In many regards, advisors were enthusiastic about the ways that blended models can, for some client groups, increase engagement, broaden the number of clients they are able to reach, and improve the efficiency of their organisations.

There is no 'one size fits all' model for blended advice provision. For most advisors, decisions about which models to use and how to implement them hinge upon an initial triage of the individual client in order to ascertain their preferences and capabilities. Requiring clients to use remote communication platforms when it is not their preference runs the risk of client disengagement and excluding vulnerable client groups who may struggle with digital literacy, access to telephones, or who may simply require face-to-face interactions in order to build the trust necessary for meaningful engagement.

Effective blended advice provision may be impeded by broader constraints in the advice sector. The incorporation of new communication methods into the advice process has created several challenges in terms of exacerbating resource constraints, the ability to forward-plan, as well as increased burdens in terms of workload and wellbeing. Whilst blended delivery models do present opportunities for increased efficiency, these benefits hinge on the broader stability and financial security of advice organisations, which is frequently challenging for those working in the not-for-profit sector.

Investment in blended advice has the potential to improve access to justice for clients. Clients emphasised several benefits of blended advice, including increased accessibility and flexibility, with clients able to access advice at a time and in a format that suits them, as well as improved confidence and autonomy within the advice process due to being able to choose for themselves how to receive advice.

Face-to-face interactions will always be needed by some clients. Despite the advantages of blended advice models for clients, interviews revealed that some clients face disproportionate challenges with remote methods of communication. For some clients, effective client-advisor relationships are fundamentally constrained without face-to-face interaction, and for others, there are insurmountable barriers relating to technology that would prevent them from accessing advice if face-to-face appointments were not retained as an option.

There is some evidence to suggest that success with blended advice models may be particularly associated with certain circumstances and legal problems. In some circumstances, positive use of blended advice models can be associated with certain client characteristics, such as those living in remote areas, younger age groups, or those with mobility-related disabilities. However, there is some evidence to suggest that blended advice models may have the opposite effect in other circumstances, such as clients with mental health problems and other kinds of disabilities, who were frequently at risk of disengaging from services entirely if face-to-face appointments were not offered.

Further evaluation and investigations are needed to assess the suitability of blended advice models in the future. Given the frequency with which client characteristics and circumstances intersect, especially among those who experience problems relating to housing, debt, and welfare benefits, it is extremely difficult to pre-empt or anticipate the kind of advice methods that a given client will require. The findings presented in this report provide a starting point for further evaluations and investigations into models of best practice, as well as specific recommendations for developing a robust suite of options that may be offered to clients in the post-pandemic future.

1. Introduction

This report provides the findings of the first empirical investigation into ‘blended advice’ after the COVID-19 pandemic. Blended advice, sometimes referred to as ‘hybrid advice’, refers to models of advice delivery which involve providing legal advice through a combination of face-to-face interaction and remote communications. Importantly, there is no single model of blended advice provision. Rather, there are various strategies for determining when and how different formats might be used at different stages of the advice process. The purpose of this research project was to explore how these blended models have emerged and developed over the course of the COVID-19 pandemic, from March 2020 until March 2022.

The specific focus of the project was to understand how blended models have been implemented by advice organisations in England and Wales which are funded under the Legal Support for Litigants in Person (LSLIP) grant. At the time that the LSLIP grant programme was launched, many advice organisations were already swiftly adapting their services to be delivered remotely, in response to the sudden need to protect advisers and clients during the COVID-19 pandemic and comply with restrictions on movement imposed by governments in England and Wales. As a consequence, the lifetime of the grant has coincided with a rapid period of change, with organisations using this funding to develop new working practices and advice models to suit the COVID-19 context. In the early stages of the pandemic, this invariably involved a shift towards purely remote delivery models, before face-to-face communications were able to be gradually re-incorporated. Conducted two years on from the initial outbreak of the pandemic, this research sought to evaluate the ways that advice organisations are starting to blend face-to-face and remote methods of communication during the advice process, and consider what lessons have been learned during this unprecedented and intense period of change.

There have been previous studies of remote delivery and the use of technology in advice provision, such as Smith’s (2019) report on Digital Delivery, the Law Society’s (2019) report on Technology and Access to Justice, and the Open Society Justice Initiative’s (2021) guide to providing legal services remotely, as well as studies on remote delivery

from other sectors. The findings of this project build upon this literature and provide new insight into the ways that LSLIP-funded advice organisations adapted their provision during the pandemic and have pivoted towards blended delivery models as they look towards a post-pandemic future. These findings contribute to a growing understanding of the utility of remote methods for certain client groups and legal problems, and reveals the extent to which they have subsequently been incorporated into blended delivery models by advice organisations. The findings also serve as an important reference point for the development of future policy initiatives, because they indicate some of the facilitating and limiting factors that can support or impede the success of blended models as we move towards a post-pandemic era of legal advice.

In terms of structure, this report will begin by outlining the empirical methods and research strategy that underpinned the project design. The report then moves to provide a review of existing literature concerning remote methods and blended delivery. The research findings are then presented across sections 4 and 5. These sections draw upon insight from advisors working at the frontline of the development and delivery of blended models, as well as the first-hand experiences of clients who have relied upon blended models. In section 6, the research findings are drawn together in order to provide a concluding reflection on the opportunities and challenges associated with blended advice models and their potential utility for the future.

2. Methods and Research Strategy

2.1 Research Aims and Project Objectives

This research project sought to provide an insight into how methods of advice provision have changed among LSLIP-funded¹ advice organisations between March 2020 and March 2022, and the potential role that blended advice models may play in the future of advice provision. This comprised a multi-pronged investigation. First, it identified the extent to which participating organisations were providing face-to-face advice, remote advice, or a blend of each (blended advice) to meet the legal needs of clients experiencing problems in three key areas: housing, debt, and welfare benefits. Second, it explored some of the ways that clients accessing advice in these areas experienced these advice methods in practice, with particular attention paid to the perceived usefulness and accessibility. Third, it considered the appropriate role that blended advice methods should play in future advice provision to ensure that legal needs are effectively met across these three areas of law.

The project was guided by addressing the following research questions:

- 1) How have LSLIP-funded organisations adapted their approach to providing legal advice in housing, debt and welfare law since March 2020?**
 - a) What methods of advice provision are organisations currently using, and are these different to pre-pandemic methods?
 - b) Are organisations targeting different provision methods at different client groups?
 - c) Are there any blended methods of advice provision that organisations anticipate using in the longer term, and why?
 - d) Do organisations perceive blended advice provision as effective, and do they have any concerns about using these methods?

¹ 'LSLIP-funded advice organisations' refers to the wide cohort of local, regional, and national advice organisations who received funding through the 11 partnerships provided through the Legal Support for Litigants in Person grant programme, launched in April 2020. See: <https://atjf.org.uk/legal-support-for-litigants-in-person-lslip-grant>

2) What are the opportunities and limitations of remote advice provision?

- a) Are there any challenges associated with remote advice provision for clients in housing, debt, and welfare law?
- b) What role might or should remote advice provision have in the future for these clients?
- c) For whom is face-to-face advice provision important?
- d) What methods of advice provision do clients find most useful, and why?

2.2 Research Strategy

The data presented in this report is grounded in a literature review of existing knowledge prior to May 2022 concerning, first, the provision of remote advice and, second, experiences of legal services provision during the pandemic. A comprehensive summary of these existing studies is contained in section 3. In total, this review considered a range of 88 secondary sources, including recent and longstanding reports published by practitioner organisations, charities, not-for-profit groups, academic literature on the advice sector, as well as publications concerning other areas of non-legal service during the pandemic.

Building upon this secondary data, the project employed a qualitative approach, drawing together three sources of primary data collection: case studies supplied by advice organisations (both LSLIP-funded and those funded by the Community Justice Fund); focus groups with frontline advisors from LSLIP-funded advice organisations; and client interviews. The decision to collect qualitative data from three distinct primary sources across three distinct areas of law was made to ensure that the project would be informed by a variety of experiences which could offer a rich degree of depth across a defined degree of breadth.² The primary data is of direct relevance to LSLIP-funded organisations,

² A key reason for this qualitative strategy is that the Ministry of Justice already collects a wealth of quantitative data and case studies concerning outcomes for clients and organisational efficiencies from LSLIP partnerships as part of ongoing scheme evaluation. The purpose of this project was to build upon this data by providing a rich, qualitative insight into frontline advisor experiences, as well as often-underexplored client perspectives, neither of which could be captured through present evaluative strategies. See further: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1049581/lslip-mid-grant_review.pdf

but will also have wider salience across legal services and the advice sector, and likely for wider service provision beyond.

Ethical approval for the study was obtained from the School Research Ethics Committee at Cardiff University in December 2021. This process entailed a robust peer-review of the research team's proposed strategy regarding recruitment, research methods, and data management arrangements. A key ethical consideration that emerged during this process was the importance of ensuring anonymity for all participants who contributed to case studies, focus groups and client interviews. Jigsaw identification (the possibility that participants may be identified by the content of their contributions, even if their names and identifying information are removed) was a particular risk in this project due to the highly collaborative nature of the advice sector in England and Wales. As such, additional measures have been taken to restrict information about participants – such as geographical location, type of organisation, or personal characteristics – where not strictly necessary to illustrate the narrative of research findings.

At points, this report identifies and explores the ways that remote methods of communication may exclude vulnerable client groups. The term 'vulnerability' is often used to describe individuals that are disadvantaged in specific situations or within society more broadly. It is important to clarify that the research team does not equate vulnerability with any specific personal characteristics or circumstances. Rather, the term vulnerability is used in this report to refer to a reality in which a person is impaired in their ability to withstand a crisis or difficulty. Such circumstances include but are not limited to personal characteristics such as a lack of cognitive or language abilities (inherent vulnerability). They can also be rooted in how these characteristics manifest within specific circumstances such as being unemployed or homeless (situational vulnerability). For an understanding of how such vulnerability can play out with clients seeking legal help and advice see Mayson (2022).

Case Studies

Case studies are a valuable tool for providing rich, detailed examples of social phenomena, especially when combined with other methods of data collection in a triangulated study. Six case studies have been reproduced in this report which usefully

illustrate the various themes identified across the three areas of law, providing specific exemplifications of how blended models of advice are being used in practice.

These case studies consisted of written accounts which were voluntarily provided by frontline advisors by email during the data generation stage of the project. LSLIP-funded organisations, as well as relevant organisations supported by the Community Justice Fund working across the areas of debt, housing, and welfare benefits law, were invited to submit case studies. The decision to broaden this component of the research to include other organisations was made so as to, firstly, reduce the burden on LSLIP organisations who were participating in this project, and secondly, to provide a broader insight into whether the themes identified during focus groups and interviews were reflective of wider experiences outside of the LSLIP grant holders. These case studies provide insight into the needs of client groups for whom interviews would have been inappropriate or impractical, as well as a more detailed understanding of how advisors perceived clients' responses to blended models.

Case studies have been edited for consistency and to preserve the anonymity of the clients and advisors upon which they were based. This involved redacting limited amounts of material where appropriate, albeit nothing that altered the original authors' meaning. These case studies are presented at various points across sections 4, 5 and 6 of this report in order to deepen and illustrate articulations of relevant themes that cut across the research findings.

Focus Groups

In order to gather an understanding of the different blended models that organisations had adopted, three substantive focus groups were conducted with frontline advisors, focusing on debt, housing and welfare benefits law. Advisors from all LSLIP-funded organisations were invited to join focus groups, with a maximum of one advisor per advice organisation permitted at each focus group (fulfilling a range of roles from frontline service provision to project managers), to enable sufficient breadth of discussion and representation from within and between different organisations. A registration system was used in order to cap attendance at ten participating advisors per focus group, so as to allow sufficient scope for advisors to actively participate in discussions. Focus groups were purposely scheduled for dates and times that were typically quiet periods of advisors' schedules in order to enable

maximum possible attendance. The number of participating advisors ranged from five to nine across the three focus groups, with 24 advisors in total. These organisations included support services, generalist advice service, specialist legal advice providers and law clinics, mainly drawn from larger, national organisations in both England and Wales. This variety resulted in important comparisons and contrasts across the groups. Participants were based in a mixture of cities and towns, and involved a spread of organisations that served both urban and rural areas leading to discussions of the different experiences of serving clients across varying socio-geographic contexts.

Focus groups were conducted virtually via Zoom, and each lasted approximately 90 minutes. The focus groups were structured into three 30 minute sections. First, discussions focused upon identifying the different models of advice being used by advisors across the organisations that were represented at the focus groups. Second, advisors were invited to share their views about the suitability of remote advice provision for their clients and the specific nature of the problems that they encounter within the area of law in focus. Third, advisors were invited to share their views about how blended models of advice provision might be used going forward into a post-pandemic world.

Client Interviews

Due to their circumstances, clients who rely on advice organisations are often hard to reach. While it is possible for researchers to cold-approach clients at advice organisations, this comes with specific ethical difficulties, as it carries the risk of imposing undue pressure on clients to participate in interviews, as well as potentially facilitating emotional harm if clients are not psychologically prepared to discuss their experiences surrounding their legal problems.

In order to avoid these challenges and promote best practice in terms of ensuring clients' safety and wellbeing, an opportunistic gatekeeper-led approach was taken to recruiting clients for interviews. Following focus groups, advisors were asked to facilitate contact with known clients who may be interested in participating in the research project. Due to their existing relationship and rapport with their clients, advisors were able to discuss the project with clients in advance in order to empower them to make their own decisions about whether they were interested in participating in an interview. If clients were interested in the project, they were encouraged to contact the researchers via any one of a range of

methods, including telephone, instant messaging, email, or any other medium that was accessible to them. In some cases, this involved the advice organisation providing the client with private access to an office with a telephone or computer so that they could reach the research team. Once clients had contacted the research team, time was taken to explain the context and objectives to the research project, data retention and anonymisation arrangements, assure clients of their right to withdraw from the project, and to clarify any questions about how their contributions would be used. At all stages, clients were assured that their participation in an interview bore no relation to their use of the advice organisation, nor their ability to seek advice in the future. Once satisfied, the interviews would proceed at a specified date and time convenient for the client. It is an inevitable limitation of this recruitment strategy that participating clients are likely to be those that had a positive relationship with their advisors, and that are potentially less vulnerable with less acute or all-encompassing issues. However, this was determined to be an appropriate balance to strike in terms of protecting potentially vulnerable clients from the ethical risks outlined above.

In total, the research team interviewed ten clients; two who had experienced debt problems, three who had experienced welfare benefits problems, three who had experienced housing law problems, and two who had simultaneously experienced both housing and welfare benefits problems. Interviews were semi-structured, combining a set interview schedule with ample opportunities for clients to shape the trajectory of the conversation and contribute new or contradicting ideas that aligned more closely with what mattered to them. The topic guide was informed by the themes identified during the focus groups with advisors, but drawing out further detail on their problems and the methods of advice, as well as asking the clients what they would like people to know about their experience.

Data Analysis

Given that a key objective of this project was to provide rich insight into frontline experiences of advisors and clients during the pandemic, the research team opted to use reflexive thematic analysis to analyse the data generated by the focus groups and interviews. Reflexive thematic analysis is a widely-used analytical strategy in qualitative research, which involves identifying common patterns and themes across datasets through a rigorous phase of researcher familiarisation with data and coding (Braun and Clarke

2019). In practice, this involved a team of three research assistants reviewing all transcripts to identify common themes and then collaborating in order to review themes and negotiate the codes that would ultimately be used to signify the key commonalities that were located within the data. During this negotiation process, some themes were broken down into more specific themes to provide appropriate specificity, for example, 'client barriers to technology' was elaborated into 'barriers to telephone communication' and 'barriers to internet-based communication'. This process enabled the research team to thoroughly engage with the data and draw links between the codes and existing literature. The analysed data is presented across sections 5, 6 and 7 of the report.

2.3 Research Challenges

One of the chief difficulties of conducting this research project during the pandemic came from the fact that the research team itself was constrained to using remote methods. Due to a combination of government-imposed restrictions and new COVID-19 specific institutional risk assessments on conducting fieldwork, the life of the project was characterised by significant limitations on the research team's ability to conduct research face-to-face. Interviews were conducted with as much flexibility as possible, but were ultimately constrained to a combination of video conferencing and telephone. Case studies were collected via email.

The impact of these constraints varied across different elements of the project. First, collecting case studies by email was least problematic, as this is the same method used to collate case studies from advice organisations for the purposes of LSLIP evaluations, and were therefore naturally provided in this way by advisors regardless of pandemic restrictions. Second, the research team judged that the focus groups were also largely unproblematic because advisors had ready access to the technology and had developed much experience in using it, especially over the period of the pandemic. Indeed, conducting these online was efficient, effective and potentially more convenient to advisors who may have otherwise been restricted from attending in-person focus groups. While face-to-face focus groups would have been preferable to help build rapport, the sessions flowed well and produced a rich range of data. Third, the potentially most problematic impact of these constraints related to interviews with clients. Whilst the research team endeavoured to offer clients a choice between video-conferencing, which was expected to

offer greater capacity for rapport-building and personal connection, and telephone calls, clients unanimously opted for the telephone. Moreover, conducting these interviews via any remote format risked potentially excluding those clients who were excluded by the shift towards virtual advice provision.

In response to this concern, the research team considered various solutions, including asking advisors to conduct the interviews themselves if the clients were not comfortable using technology at all. However, having advisors conduct interviews would have potentially introduced an undue level of influence on what clients felt able to say in their interviews in case, for example, they were worried about expressing something that may be disagreeable to their advisor. Such an arrangement also risked the research team being unable to verify that clients were participating in interviews with full and informed consent. As such, the research team acknowledged that there would be limitations on the reach of the interviews. The findings presented in this report should therefore be read with an implicit recognition that the interviews may not have included the full range of clients.

Despite the constraints of the interviews being conducted remotely, they were nevertheless effective and meaningful interactions. The telephone is often less restrictive than video conferencing software, meaning that the team were able to reach clients who could not use a computer but did have a landline or were able to borrow a phone. Across the research team, there was extensive experience of conducting research interviews remotely in previous projects, meaning it was possible to develop relationships remotely, and to ensure interviews were arranged in a way that was as flexible as possible for clients, including bearing the financial costs for phone calls to maximise accessibility. Furthermore, as presented in section 5, several of the accounts provided by clients during interviews were from those who expressed concerns and a lack of confidence with technology and remote methods, and this serves as an assurance that the data generated during these interviews do not only speak for those clients who are typically confident in and satisfied with using technology.

2.4 Research Limitations

The research underpinning this study was qualitative in nature, seeking to describe, analyse and thus understand human experiences. As such, it was not designed to seek

generalizability but rather to capture people's behaviour, their perceptions and their understandings of social phenomena and events. While there is undoubtedly value in conducting quantitative research in this area, there is already a wealth of quantitative data regarding organisational performance captured by LSLIP evaluation measures.³ Moreover, the post-pandemic future of advice provision is largely unexplored territory, in terms of *what* advice organisations are doing to help their clients, and *how* these strategies work on-the-ground. Therefore, the purpose of this project was to provide insight into the voices of those who have experienced advice provision first-hand, to provide a starting point for other qualitative investigations into other areas of law, as well as robust data-collection strategies that can be implemented sector-wide once the parameters of this new era of advice are adequately understood.

Nevertheless, due to the small-scale, exploratory nature of this research, the extent to which these findings can be extrapolated in relation to the whole advice sector, or the wider population of people who may seek advice in relation to their legal problems, is limited. Furthermore, the sample is constituted by experiences of advice provision in debt, housing and welfare benefits only. Although the research was never intended to offer a representative sample of the wider advice sector, it is important to acknowledge that this sample limits the extent to which the data can provide insight into areas of law beyond these three areas. Nevertheless, by collecting data from across a mixture of organisation types situated in a broad range of geographical locations, and including advisors and clients that have experienced a variety of legal issues, it is possible to garner useful insight into the range of possible perspectives and experiences that may characterise experiences of the wider advice landscape during the pandemic. Further, while some trends are noted to be more prominent in some areas of law (for example, disengagement in debt cases), at no point were issues encountered that were so specific that they would not have potential wider applicability. Such trends are intended to be taken as a starting point for future research and evaluation, as described above.

³ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1049581/lslip-mid-grant_review.pdf

3. Background to the Study

Since the outbreak of COVID-19 and the imposition of lockdown measures, digitisation was necessarily imposed upon various industries which had to quickly adapt to remote working and navigate the various practical and logistical difficulties that accompanied these measures. Legal services were no exception, but many advice organisations faced these challenges alongside a broader increase in demand for their services among members of the public particularly in relation to **debt law**, **housing law**, and **welfare benefits law**. The increase in demand for advice in these areas can be at least in part attributed to the closure of several industries and necessitated social isolation during the pandemic, which caused many individuals to begin experiencing financial precarity for the first time in their lives (Creutzfeldt and Sechi, 2021; Law Centres Network, 2020).

Although some legal advice providers were already providing virtual support before the pandemic, when all rapidly moved their services online it was widely acknowledged that staff had to quickly change their work arrangements and practices (LawWorks, 2020a; LawWorks, 2020b; Ng, 2021). Questions then began to arise about the degree to which this move has impacted the recipients of these services. This issue is especially important given that there were already several existing debates about the acceptance of technology in legal services and the general digitisation of the legal sector which predated but were exacerbated by the COVID-19 pandemic (Legal Services Board and Solicitors Regulation, 2022; Harris, 2020; Creutzfeldt, 2021; Smith, 2019).

3.1 Current Knowledge on Blended Delivery of Legal Advice

At the initial outbreak of the pandemic, advice provision was rapidly transformed into a largely remote process. This presented a variety of obstacles for advice providers, staff, and clients alike. These issues, despite their number, can be categorised as challenges relating to: demand, access, and communication.

Demand

Following the shift to remote delivery, legal advice providers saw a dramatic increase in demand for their remote services (Law Centres Network, 2020; LawWorks 2020a). This

surge then created great uncertainty among providers about how this demand should be met (LawWorks, 2020a). This uncertainty was particularly prevalent across debt, housing, and welfare benefits advice (Law Centres Network, 2020; LawWorks, 2020c), as a wave of new clients was emerging during the pandemic. These new clients mainly comprised people who were previously thought to be 'living outside of legal aid' (LOLA) (Newman et al, 2021; Law Centres Network, 2020) who likely sought this kind of free legal advice due to the financial strains created by the COVID-19 pandemic (Hirsch, 2018). This increase in LOLA clients arguably reinforces O'Hara's (2012) earlier claim that instead of simply shifting delivery channels, digitising advice simply expands the pool of these services to include different, less vulnerable populations. During the pandemic, advisors saw little contact from their regular, more vulnerable clients, feeding broader concerns relating to digital exclusion and the accessibility of legal services (Creutzfeldt and Sechi, 2021).

Access

It has been well documented in digitisation research that relying more heavily on digital or virtual methods of service provision has the potential consequence of excluding more vulnerable populations. This may be due to these populations either lacking confidence in their use of technology, or their inability to access these resources (Creutzfeldt, 2021; Next Century Cities & Samuelson Law, Technology & Public Policy Clinic, 2022). These concerns are invariably further aggravated by pre-existing societal obstacles to accessing legal services, such as advice deserts and economic barriers. The potentially disproportionate impact of these obstacles is particularly emphasised in research that focuses on the specific areas of debt, housing, and welfare benefits law. This is due to the reality that seeking protection for vulnerable groups is typically at the centre of legal action within these areas (Newman et al, 2021; Gillespie et al, 2017; Harris, 2020; Burton, 2018; Sechi, 2020; Creutzfeldt and Sechi, 2021). However, despite these concerns, there is also some research to suggest that access to legal services may be improved by digitisation. For instance, Fennel's (2021) investigation into the accessibility of welfare services during the pandemic to people with various disabilities (which included a range of physical and mental health conditions) revealed a mix of both improved and impeded access as well as variable quality of communication.

Communication

Existing research indicates that remote delivery can, in almost equal measure, have the effect of either impeding or enhancing communication. This depends on a variety of factors, including the personal characteristics and circumstances of the client. As noted above, Fennel's (2021) mixed findings as to the accessibility of welfare services during the pandemic proves as a useful example of this. However, this study is far from alone in drawing conclusions that hinge upon specific personal characteristics of clients. Cain and Goldring (2018), for instance, indicate that advice delivery through instant messaging apps like WhatsApp are helpful for groups such as younger people and second-language English-speakers who may find it easier to communicate through these methods.

What is more divisive within existing literature is the question about whether telephone advice promotes efficiency within communication. On one hand, Burton (2018) found that, when compared to telephone alternatives, face-to-face advice interviews resulted in increased emotional connection, amounts of non-verbal communication, expansive discussion and furthered the parties' abilities to consult and confer over documents. Similarly, Balmer et al (2012) suggest that, despite popular belief, telephone advice can, on average, take longer than face-to-face advice which they found when controlling for key variables like demographics, case type, and stage reached. This suggests that a variety of factors need to be considered when assessing the effectiveness of telephone advice.

The results of these studies have furthered arguments of others, including Yates (2015), The Law Society (2019) and Newman et al (2021) which have each separately advocated for embracing the advantages of digitisation whilst mitigating the limitations through approaches that combine remote and face-to-face methods of advice delivery. As indicated by the Open Society Justice Initiative (2021), blended advice models may potentially prove to have beneficial effects long after the pandemic ends.

3.2 Exploring Blended Delivery in Other Legal Areas

It is also possible to assess the efficiency and potential value of blended delivery by looking to other legal sectors such as criminal, civil and family law and beyond, to include other services like the delivery of court hearings. Across these processes, the issues of access and communication have also been central to emerging evaluations of blended models.

Access

Research on the digitisation of the legal sector has noted the likelihood of digital exclusion having a significant detrimental impact on vulnerable groups. This concern has been identified in respect of a variety of legal areas as well as various populations of clients and service users. Interviews with family law professionals conducted by Richardson et al (2021), for instance, indicated concern for socially excluded people and their access to family law services should the sector be further digitised. Specifically, the participating professionals in this study reported that they felt making in-person services wholly digital would likely impede vulnerable groups' access to a fair and just process.

Communication

The focus of existing studies is frequently on the accessibility of these systems once engagement has begun, whether this means accessibility in terms of ensuring the engagement of lay people, or taking steps to make a system more inclusive for those with mental health issues, cognitive impairments, or other health conditions.

Concerns about accessibility and communication within the justice system are raised by Rossner (2021) and Rossner and Tait (2021) in relation to criminal hearings. Both of these commentaries highlight the important relationship between quality communication in court trials and the broader inaccessibility of legal systems. Rossner (2021), for instance, noted that the virtual trial process made it significantly harder to ensure meaningful public participation in trials, but also that the likelihood of technical difficulties had been frequently underestimated. In contrast, Rossner and Tait's (2021) study involved establishing a 'distributed courtroom' (a shared virtual space for all trial participants). This experimental innovation suggested that a fully digital courtroom dynamic may in fact help with communication and participation, as it may help improve how defendants are perceived by other participants, as defendants can often be more negatively viewed when they are alone in appearing through video-conferencing software in a hybrid courtroom setting.

These uncertainties and obstacles have been differently framed by those authors who are more centrally focused on overcoming inequalities and forming more inclusive processes within legal systems. Research by organisations like the Equality and Human Rights Commission (2020) and Transform Justice (2021), for instance, both indicate the likelihood of digital processes having a damaging effect on communication for vulnerable service

users. In the context of criminal trials, the Equality and Human Rights Commission (2020) found that disabled defendants were disadvantaged by the move to video hearings for a variety of reasons. These included fewer opportunities to identify and respond appropriately when defendants are experiencing difficulties. As such, this study identified notable barriers for defendants with cognitive impairments, mental health issues, and neuro-diverse conditions. Similarly, a survey of 315 appropriate adults in England and Wales conducted by Transform Justice (2021) reported that the quality and delivery of advice given to vulnerable people in police custody had been negatively affected by the practices implemented whilst under lockdown measures. This conclusion was drawn from data which showed that in almost half of cases, advice had been delivered remotely and that this had been audio-only in 38% of cases. Along with this, the appropriate adults also stated that the consent of suspects and their appropriate adults was not sought in many of these cases and that solicitors often seemed passive during these processes and even refused to attend in person to advise those accused of serious offences. These show that digitisation has potentially impaired the defendant's ability to communicate and perhaps even denied them of opportunities to do so.

From this review of existing research, it can be understood that the issues of demand, access, and communications are centrally important to understanding how legal services can be best delivered across debt law, housing law and welfare benefits law, and that these issues are likely to be key to an evaluation of blended advice models in these areas of law. Finally, when undertaking such an evaluation, it is also important to consider the specific circumstances of the COVID-19 pandemic. The shifting nature of this context is likely to necessitate ongoing evaluations of blended advice models, as we continue to adapt to the emerging post-pandemic context of legal need and legal services (Byrom 2020).

4. Findings: Advisors

4.1 Key Findings

- During the initial outbreak of the pandemic and subsequent lockdowns, advisors were required to provide advice entirely remotely. As pandemic-related restrictions gradually eased, advisors began to implement a range of blended advice delivery models, varying from those that involve an initial face-to-face appointment followed up with remote methods, to those that involve gathering initial information virtually, followed up with a substantive, targeted face-to-face appointment.
- Advisors identified several benefits of blended advice for their clients. There was evidence of increased and improved client engagement, with advisors able to reach a broader range of clients who would previously have struggled to attend face-to-face appointments, such as those with mobility problems and caring responsibilities.
- Advisors also identified the potential benefits of blended advice for their working practices. Incorporating remote methods of communication was, for many, useful for improving efficiencies in their advice provision. Some advisors reported that it was easier to maximise the benefit of their time during face-to-face appointments when clients were able to send screenshots or photographs of relevant documents in advance. Similarly, advisors found it easier to seamlessly refer their clients to speak to lawyers remotely, rather than having to physically come into the advice organisation.
- Advisors also reported greater opportunities for innovation. Several organisations have adapted their working schedules to offer evening appointments to their clients or offer clients use of their IT equipment during face-to-face appointments to support them in completing paperwork. Additionally, the pandemic led some organisations to begin implementing contingency practices, such as ‘splitting’ appointments across advisors to accommodate the unpredictability of childcare demands and illness among advisors. While these may have been intended as temporary measures to cope with the initial COVID-19 crisis, these have been retained by some organisations as part of a longer-term commitment to flexible working.

4.2 Advisors adapting their advice-giving methods

For many advice organisations, the initial outbreak of the pandemic marked a rapid and unprecedented shift to remote methods of advice delivery, and a subsequent, gradual movement towards blended models as the pandemic progressed into its later stages. Although the implications of the pandemic are still unfolding, the last two years have marked a significant period of change for how organisations provide advice.

Prior to March 2020, face-to-face meetings had traditionally been the dominant and favoured method for delivering advice. During the pandemic, advice organisations were required to provide advice in different ways. During focus groups, advisors reported using a variety of models, such as:

- Advising clients entirely remotely via video conferencing software or telephone
- Advising clients entirely face-to-face at advice services
- Conducting initial ‘triage’ meetings face-to-face, subsequently followed up via virtual methods including telephone, email, video conferencing, and instant messaging platforms
- Communicating with clients initially via email, telephone, or instant messaging platforms followed up with a more comprehensive face-to-face advice session

Across **all three areas of law**, there was a strong consensus among advisors that it was necessary to be flexible when deciding which model to follow, and that it was common practice to frequently change between these different models, as appropriate. Decisions about which methods to use hinged upon three factors: pandemic restrictions; available staffing and resources, and; client capability. During this time, some advisors reported that being unable to rely on traditional face-to-face methods limited their ability to help clients most effectively:

“We can have a number of volunteers in an office seeing a number of people and one specialist doing the case work [remotely] in the background. But that’s... not the most viable option for it. Face-to-face has always been preferable for casework.” (Housing Advisor)

Remote communication with clients takes place via a range of virtual methods, including video conferencing platforms like Skype, Zoom, and FaceTime; email; telephone calls; written letters, and; instant messaging platforms like WhatsApp and Facebook messenger. Decisions about which methods to use are guided almost exclusively by what is most convenient and accessible for each client, meaning that these practices vary significantly even within organisations and client groups. The only clear pattern that emerged during focus groups was that telephone calls appeared to be the dominant method used by organisations providing advice related to **housing law**. As one advisor explained:

“Telephone advice is our main bread and butter at the moment. It [has] been for the last two years, it’s really picked up.” (Housing Advisor)

The pandemic-induced shift can therefore be understood as a shift from ritualistic provision of face-to-face advice, to a less definitive and more flexible approach to providing advice, via a multiplicity of blended methods. However, this is not to say that organisations were not already innovating and experimenting with blended methods of delivery prior to March 2020. Focus groups across **all three areas of law** revealed that several organisations had already been combining face-to-face meetings with virtual communication methods like videoconferencing and telephone calls:

“We’re used to having to do a bit of a hybrid of advice because we have such a broad geographical area. We have clients in very remote areas. So, it’s quite common to pick somebody up on a telephone advice line and give them some initial advice.” (Housing Advisor)

"Pre-pandemic, some of the team already worked remotely. They would occasionally go into the community to do outreach and set up coffee mornings or join sessions with potential clients and then provide advice there." (Welfare Benefits Advisor)

Combining communication methods was particularly common among organisations serving rural or remote areas before the pandemic. These approaches were described as useful ways to reach clients unable to visit premises in person, and to facilitate greater productivity among advisors who could deliver advice from home. As a consequence,

advisors working in these organisations felt that they already had a baseline level of preparation for the shift to remote and blended models that came after March 2020.

Taking this together, it is clear that blended methods of delivery are here to stay. During focus groups, advisors highlighted the potential opportunities that this may hold for delivering services more efficiently and effectively as well as the possibility of increasing the accessibility of advice, and engaging with a broader range of client groups. However, advisors also emphasised significant concerns associated with providing less advice face-to-face, and the risks of excluding certain client groups if this is not retained as a key means of providing advice.

4.3 Opportunities associated with using blended methods

Despite the initial challenges that came with adapting services during the pandemic, advisors reported that over time, they have found blended models to come with several positive opportunities for improving advice provision. These can be categorised into three main benefits: increased and improved client engagement; improved efficiency of working, and; greater innovation and flexibility.

Increased and improved client engagement

Advisors reported that broadening their methods of advice provision meant that they can increase the number of clients they are able to assist, as well as improve levels of engagement among clients. These benefits were attributed to the ways that blended models enable services to reach a wider geographic spread of clients, and engage more fully with clients who would have typically struggled to attend appointments in person due to disability, ill health, or unpredictable employment arrangements.

Case Study 1, Glenn's Story – How Remote Methods Help

Glenn sought advice in relation to a debt. Glenn is a carer for his bed bound disabled partner. Glenn had originally taken out a credit card in 2013 when it was affordable to him, but he later realised he could not afford it and the debt had been passed to a debt collection agency. This agency had set up a repayment plan with Glenn for £13 per month. The agency wanted to increase it to £18 per month and Glenn felt he could not afford it.

The initial advice was given to Glenn through a video call with a secure link. This was followed up in writing with a plan of action. The interview followed a set format where the advisor gathered information on Glenn's circumstances, including details of his income and expenditure. Glenn had everything to hand because he was at home and able to look up the information he did not know and find his paperwork.

During the video call, the advisor identified that Glenn also needed housing advice, as he was placed in a first floor flat with a bedbound person and their Housing Association landlord would not move them. In the event of a fire, Glenn's partner could have been trapped in the home and Glenn had to get help from other people to get the partner downstairs for hospital appointments.

Video calling worked well for Glenn, as he was very happy not to have to come to an in-person appointment – he did not want to have to leave the house and leave his partner on their own.

In **welfare benefits law** and **debt law**, advisors noted that using blended models meant that there were far fewer missed appointments from these client groups, due to the convenience and flexibility of being able to communicate remotely:

"So, for them, we're definitely seeing that [there's] less missed appointments because... they can now just access that online." (Welfare Benefits Advisor)

“The introduction of remote service delivery has meant that we have been accessing people that would previously have found it difficult to travel to in-person appointments, people with disabilities, people with children with complex needs, with an inability to take time off work, so that’s been positive.” (Debt Advisor)

This suggests that blended models of advice delivery may provide an important means of promoting accessibility and quality of service provision. Nevertheless, ongoing evaluation of blended models is necessary in order to understand experiences among different client groups. Although **welfare benefits law** advisors reported that using blended methods reduces the overall time it takes for problems to be solved, in **debt law**, concerns were raised about the extent to which engagement is sustained beyond initial contact:

"It's now at the stage where I can get everything done in one appointment so that you don't have to keep bringing clients back." (Welfare Benefits Advisor)

"I believe that the level of engagement after the appointment decreased significantly, so you can communicate with the clients but engagement post-appointment suffers." (Debt Advisor)

Taken together, blended models are likely to increase and improve initial engagement among clients. This is extremely beneficial in terms of providing services during the early stages of a legal problem, before a problem escalates and becomes more complex. However, further evaluation will be required to determine whether the increase in initial engagement translates to effective resolutions, or if there is a risk of clients ‘dropping off’ after their initial contact. Focus groups revealed this concern to be especially prevalent in **debt law** where they could be a period of relative calm before the client reaches “crisis point” and re-engages, but is likely to also be a potential concern for any clients who are already at risk of disengaging with services.

Improved efficiency of working

Advisors also reported that these methods had helped them to provide services more efficiently. With fewer clients missing their appointments, and greater flexibility for advisors to be able to log in and speak to clients remotely, advisors are able to maximise the time that they spend providing advice.

Improved efficiency was evident in the mechanisms that advisors were using to communicate with their clients. In **debt law** and **housing law**, advisors reported that using instant messaging platforms including online web chats or setting up a phone number to use WhatsApp with clients made communication quicker and more effective. For instance, advisors are able to help their clients share photographs or screenshots of relevant documents through instant messaging. This avoids the additional time, effort and expense associated with arranging for the client to come and provide these documents in person, or have them delivered by post.

Improved efficiency was also evident in the ways that organisations had adapted their ways of working and collaborating. For instance, blended models enable organisations to minimise the time that lawyers spend waiting for clients to be referred to them:

“A lawyer can be on call at their desk to give half an hour’s support remotely, whereas we used to find it quite difficult to get lawyers to give up a morning to come and sit in court and be available.” (Debt Advisor)

This approach also has the benefit of maximising the availability of legal advice and providing a more seamless service, as clients do not necessarily need to wait for a separate appointment in order to speak to a lawyer. This may go some way towards mitigating the risk of client drop-out, and is likely to expedite the problem-solving process.

Case Study 2, Poly’s Story – Remote Methods Ease the Process

Poly was experiencing debt problems. She lived with her partner and three children in a privately rented property. Poly was unable to work due to her mental health and physical health and was in receipt of Universal Credit and Child Benefit. She had no savings or assets but did own a vehicle. Some debts were incurred due to Poly’s previous gambling addiction, which was unknown to her partner. When income and expenditure was previously collated by her advisor, there was a deficit of over £300 per month found.

Poly started engaging with advice again during the pandemic using remote methods. She was assisted to successfully dispute liability for council tax arrears arising from a previous address in England. The advisor also helped Poly to successfully challenge bailiff enforcement for council tax arrears and the debts were returned to the local authority.

During the course of the advice, Poly separated from her partner and was assisted to make a claim for PIP and Limited Capability for Work and Work Related Activity in Universal Credit. This was all completed using telephone advice and WhatsApp. Eventually, Poly successfully applied for a DRO which wrote off a further £10,573, leaving her debt-free.

Poly was initially sent information by email as this was her preferred contact method. Poly was offered the option to receive advice via telephone and video conferencing, but she chose to engage mainly by phone and relied on WhatsApp messaging to provide information to her advisor and ask questions. She felt reassured that she could see that her caseworker had received their information via the Whatsapp messaging service. Poly also felt comfortable to ask questions on WhatsApp, as she had some social anxiety linked to her mental health and making calls.

These methods were used because they were best suited to Poly. The cost of each interaction was free, as Poly had a reliable internet connection, she found the technology easy to use and did not experience anxiety. Previously Poly had disengaged when asked to provide paperwork or call the office and/or attend a drop in.

Debt casework generally involves face-to-face contact meaning Poly would have needed to attend at least two or three appointments, travelling from a rural location approximately 15 miles from the nearest office. The use of remote methods was highly effective for giving advice that worked for Poly, and she continued to receive confirmation of advice through email, which Poly found much better met her needs.

Integrating online and remote methods into service provision is therefore likely to make the advice-giving process more efficient, as organisations are able to maximise the time they have available. However, many organisations are resuming face-to-face but feel they cannot scale back the remote provision that has been offered during the pandemic, resulting in a dramatic increase to their workload. Advisors across **all three areas of law** emphasised that with increased efficiency, comes a further increase in demand:

"One good thing that going remote has allowed us to do is... increase capacity for certain services. We've been able to offer more remote form-filling 'cause our volunteers [are] able to log in remotely into it. But at the same time, what it also means is we've had an increase in the amount of clients contacting us."

(Welfare Benefits Advisor)

Blended models enable organisations to improve the reach, quality, and efficiency of services. This means that organisations are likely to see increased demand for legal assistance emerging from existing legal need which was unmet under pre-pandemic advice models, as well as from those who have started to experience legal problems for the first time during the pandemic. It was clear within focus groups that these increased levels of demand and workload are having knock-on effects for advisors' working conditions, as well as their health and wellbeing. These issues are discussed further in 5.3.

Greater innovation and flexibility

Using blended advice models to improve the reach and accessibility of services would not be possible without a great deal of innovation on the part of organisations and individual advisors. Across **all three areas of law**, advisors reported examples of post-pandemic innovation even within solely face-to-face advice sessions. For example, several organisations have adapted their working schedules to be able to offer evening appointments to their clients, or to be able to offer clients use of their IT equipment during face-to-face appointments to streamline the process of completing paperwork or speaking to lawyers remotely.

"They can use our services from their desk or before they go to work or in their lunch hour, so that's a different group" (Debt Advisor)

This exemplifies the ways that greater use of blended models has encouraged organisations to think more creatively about how to provide services in a way that best suits each individual client’s circumstances, availability and capabilities – regardless of the type of legal problem that they present with:

“So it’s really about what we can deliver in the best ways and delivering advice to people as and when they want it. So I think that’s going to be a mixture of face-to-face, telephone advice, maybe out of hours. We appreciate that people want advice in the evenings. They want advice on the weekends, they don’t always want our traditional, ‘We can offer you an appointment next Tuesday at two o’clock in [the office]’.” (Housing Advisor)

Greater innovation and flexibility were also evident in the ways that organisations have adapted their working practices and management. Several advisors reported that their organisations had started to implement contingency practices, such as ‘splitting’ appointments across advisors to accommodate the unpredictability of childcare demands and illness among advisors during the pandemic. While these may have been intended as temporary measures to cope with the initial COVID-19 crisis, these have been retained by some organisations as part of a longer-term commitment to flexible working.

In a similar vein, advisors working in **debt law** and **housing law** reported that organisations had worked to improve their collaboration with other services, non-profit organisations, and local authorities during the pandemic. This further solidified their capacity to reach a broader range of clients through stronger referral networks or greater coordination of clients’ needs:

“We’ve actually worked far, far better with support agencies and built better relationships than we’ve ever had, because they’ve been the enabler.”
(Debt Advisor)

“We worked with the discretionary housing payment team at the council as well. We’ve worked with them to make it more accessible for people to apply for [Housing Benefit]. So they’ve introduced an online application form.”
(Housing Advisor)

This suggests that the pandemic-induced shift to blended delivery models may have also provided impetus for innovation even in other areas of organisations' work, including the ways that face-to-face appointments are offered and in the ways that advice organisations are able to coordinate their services with other sectors. At the core of each of these innovations is a strong dedication to providing high quality advice to clients via methods that are bespoke to their circumstances, preferences and capabilities, rather than aligned with categorical approaches guided by the type of problem that clients present with.

4.4 Challenges associated with using blended methods

While increased use of blended models holds several opportunities and benefits for improving advice services, they are also associated with several challenges. These can be broadly categorised into challenges related to technology and the accessibility of blended methods for all current and prospective clients, and challenges for organisations and advisors in terms of staff development, health and wellbeing.

Technology and accessibility of blended methods

Across **all three areas of law**, advisors reported that demand for telephone advice far exceeds the demand for videoconferencing when it comes to providing services remotely. Advisors reported that, generally speaking, most clients were far more likely to have access to a landline or a mobile phone than computers or tablets. Access to adequate videoconferencing technology and a decent broadband connection is invariably a significant barrier for clients. Offering advice via this method alone runs the risk of clients disengaging after their initial contact, or failing to present to services in the first place:

“The majority of the stuff we’re doing is over the phone. We’ve been surprised at how well that’s worked for the majority of clients.” (Housing Advisor)

"A whole cohort of clients has, sort of, disappeared in a way because they are no longer able to access, or they are not able to access a device in a remote way."
(Welfare Benefits Advisor)

“Obviously there’s still people that...haven’t got access to the internet”
(Housing Advisor)

Interestingly, in **housing law**, the preference for telephone communication over videoconferencing was not only attributable to the accessibility of technology, but also the comfort of clients. There was a widely-held negativity towards videoconferencing even among clients who would typically have preferred face-to-face advice:

“It’s an odd thing because... if you offered somebody the chance to come and see you face-to-face or the telephone they’d go for face-to-face. But they don’t tend to like attending anywhere doing video calls.” (Housing Advisor)

“They find that they don’t like us seeing them in their homes or in their own personal space rather than sort of being on neutral territory...there’s not been a lot of pickup on it.” (Housing Advisor)

This suggests that videoconferencing is not necessarily perceived as a comparable alternative to face-to-face appointments, but rather an unfamiliar and unpopular method of communication. There is potential here to consider whether and how the provision of advice on clients blurring or changing backgrounds may impact client attitudes to videoconferencing. While **welfare benefits** and **debt law** appeared to use a broader range of remote methods, the comfort of **housing law** clients was a major reason that blended advice in this area has mostly been conducted via telephone to date. The experiences of advisors appeared to indicate a notable difference between the blended advice models used in response to these clients as opposed to clients seeking assistance in relation to other legal problems, with many advisors prioritising the importance of maintaining contact with these clients via telephone rather than encouraging their clients to engage with other remote methods for fear of risking disengagement.

Nevertheless, it should not be assumed that all prospective clients will even have access to a telephone or be able to receive advice in this way. Telephone advice is particularly difficult for those in **remote locations** with poor phone service, or those contending with circumstances like **domestic abuse**, **intersecting legal problems** or **complex matters** that require extensive case work.

“We have a lot being done by telephone. I don’t think it’s the best way. It’s certainly an easier way of giving people initial advice. But it’s exceptionally difficult to casework by telephone. Immediate initial advice it’s all right for, but casework makes it very difficult.” (Housing Advisor)

“Particularly with the clients we have, we’ve got to cover a lot of remote areas where signal is an issue. We cover a lot of domestic abuse cases related to housing. So communication by telephone can only be done at certain times.” (Housing Advisor)

While telephone communication appears to be the most popular method of receiving advice, it cannot be used in isolation due to the need for advisors to have sight of relevant documents and correspondence. As discussed in section 4.3, one workaround for this is for clients to take photographs of documents and share them with advisors via instant messaging platforms. For those without access to a smartphone, however, this undermines the potential value of telephone advice, as documents must be posted to advisors or brought to an in-person appointment. This is a particularly crucial issue in **housing law**, where problem-solving typically involves piecing together several different documents on behalf of clients as the following example attests to:

“We’re finding that increasingly difficult with housing cases because of the paperwork. Our housing case worker works remotely and that is quite difficult because of the level of support that’s needed. Because it becomes more technical, I think when I’m looking at the paperwork and assessing the capabilities of clients. When I think about letters from creditors compared to letters from courts and defence forms...people seem far less capable of being able to manage that paperwork under the auspices of housing than they are in perhaps other subject areas. So that is quite difficult.” (Housing Advisor)

As such, even when clients may be able to receive advice via telephone, clients are often required to physically come into offices to provide their paperwork. This complicates matters for clients and also creates another additional administrative burden on advisors so, while telephone contact can be efficient in some ways, it is not necessarily the case in others. The following advisor highlights these kinds of problems:

“People...struggle with scanning documents over to us...At the moment, we are using our volunteers to scan paperwork and anybody who needs that face-to-face contact is... sort of passed through.” (Housing Advisor)

Advisors were therefore keenly attuned to the reality that certain clients will always need face-to-face advice, and are unable to engage with services remotely. These include clients who live in **remote locations**, **lack access to a telephone**, or are contending with **homelessness**. Unsurprisingly, this was a particularly common set of circumstances for clients requiring help with **housing law** problems:

“I know that some councils across the country have been quite good with supporting people with their digital access issues. But I don’t think it goes quite far enough to address...that fundamental reality where people don’t have...fibre internet. Their signal is really poor with their phones. And I think sometimes what it means is that there’s an initial barrier to us even assessing the right ways for them to have advice.” (Housing Advisor)

Without face-to-face advice, advisors reported that it can be extremely difficult to adequately assess client needs or manage any kind of initial ‘triage’ when a client first presents to an organisation. To combat this, several organisations are strongly committed to retaining face-to-face appointments as one of the advice options that they can offer to clients. Some advisors even reported that they had put their own health at risk by meeting with some clients in person during the pandemic in order to ensure that they did not disengage from services due to the lack of face-to-face appointments:

“A lot of them didn’t have phones, they couldn’t access the internet... we could not provide that advice if we didn’t get out. So in effect, we were asking more of some staff than of others... to go out and to deliver services. So we are now still prioritising face-to-face for our rough sleepers.” (Housing Advisor)

While blended models are likely to improve the convenience and efficiency of advice for the majority of clients, therefore, it is important not to lose sight of the barriers that exist for several traditional client groups. Particularly in **housing law**, there appears to be greater demand for telephone advice as opposed to video conferencing. Notwithstanding the success of telephone advice in this area, there are clear challenges associated with

remote methods for certain client groups across **all three areas of law**, including the ability to share relevant documents with advisors without a smartphone or access to email, and the high risk of disengagement among clients dealing with **homelessness**, who invariably require face-to-face support.

Staff Development, Health and Wellbeing

The shift to remote working that came with the pandemic not only posed challenges for adapting advice services, but also for advisors' professional development and relationships with their colleagues. The development of blended methods requires different skills and capabilities that may lead to additional training needs. Across **all three areas of law**, advisors emphasised the importance of in-person collaboration and supervision for their ability to give effective advice:

“Training and supervision becomes much more difficult remotely... it's making sure that colleagues are understanding both the training that you're giving and taking it on in the right mind-set and in the right way and understanding that you're doing so from a helpful point of view. Because you don't hear the conversations that they're having with clients to know, 'Ah, he's picked up on the issue. I don't need to worry about that one anymore.' And that becomes much more difficult remotely and it's making sure that you're not overstepping or under-stepping the barriers in supporting people as well. Which obviously has a direct link to their wellbeing and how satisfied, comfortable and supported they're feeling in their roles.”

(Housing Advisor)

Across **all three areas of law**, advisors raised concerns about the impact of the pandemic and the associated shift to supporting clients remotely, on their individual and collective wellbeing. Given the often emotional and demanding nature of advice work, the health and wellbeing of advisors is inextricably linked with that of their clients, and vice versa.

In terms of the physical risks associated with the pandemic, focus groups revealed that some advisors put themselves at risk of exposure to the virus during the pandemic to provide face-to-face advice to clients who were at risk of disengaging with services. During these discussions, advisors indicated that even at the time of the focus groups, advisors

were continuing to prioritise the ability to offer face-to-face services over their concerns about personal safety, especially in **housing law**:

“Although we are supposed to be going back to normal, that is really difficult because we have to be really conscious of our teams. And if we do that and start providing and offering large levels of face-to-face advice, we run the risk of having no service if we have a large number of infections amongst staff. So actually, I think that is constraining what we can do... we are running the risk of putting people in harm’s way. And that’s quite a difficult balance at the moment. That’s the kind of risk assessment that we’re making when we are thinking about getting people in for face-to-face advice... I think we are seeing so much face-to-face advice for housing because the benefit of having somebody in face-to-face advice quite often outweighs that risk, just because of the nature of how complex those cases can be.” (Housing Advisor)

Aside from concerns about physical safety, many advisors reported that the pandemic brought personal challenges to their wellbeing and mental health. These challenges invariably affected their experiences of giving advice via blended models. For instance, despite the evidence that suggests remote work is often more efficient, it could also complicate and create additional workload for advisors:

“Casework clients in the main are the ones that need to be seen at least once or twice face-to-face. And as a person who’s running a service and as a housing solicitor as well, you can do so much in one hour’s appointment with a client that can take untold telephone calls, messages, somebody dropping off documents. It’s a waste of resources.” (Housing Advisor)

Frustration among advisors providing remote advice was commonly felt where a face-to-face appointment with a client would have been a more efficient way of providing advice than struggling to do so through extended remote communications. As outlined earlier, this was very frequently experienced in **housing law**, due to the need to have sight of various documents that may need to be pieced together to get a full understanding of the context and history of a problem.

“When you are doing it remotely, it becomes consumed or subsumed with all the issues that relate to remote working, doing too many different things at once.”
(Housing Advisor)

Remote advice also takes a toll on advisors’ ability to work efficiently and effectively due to the very nature of working online, rather than via sequential face-to-face interactions. Remote working involves being constantly accessible by others, and provides the temptation to try to manage emails, online meetings and virtual tasks simultaneously. This can fracture working practices to the extent that advisors are spread too thinly between various demands, and may ultimately become less productive or more overwhelmed.

These challenges were especially cause for concern amongst focus group participants who held management or supervisory positions within advice organisations as in the following examples:

“As a manager I’m worried about my own mental health, frankly, to start. Because I’m finding it all a bit of a strain: two, three years into emergency mode is quite tough... I’m sure my colleagues agree with me. I’m noticing when people are not in the office together all of the time you can start to see factions, cliques. People are tired, there’s no natural way to sort of alleviate some of those issues. Because usually [when] somebody’s, you know, a bit snappy, [when] we’re all in the office, people will ask and it will be resolved really quickly. [Working remotely], people resort to emails and emails are not the best channel of communication for that type of conversation. And I think my staff are looking and feeling increasingly distressed to me.” (Housing Advisor)

“A good few of my staff have young children. They don’t really want to be having an interview with a client at eight o’clock at night. But hybrid working has allowed some of that to happen... I’ve spent quite a long time talking about work-life balance and I’m finding that over the pandemic, that’s just gone through the window.” (Housing Advisor)

As these excerpts demonstrate, the benefits of increased efficiency and flexibility in service provision associated with blended methods also come with new challenges for staff wellbeing, and the ability of managers and supervisors to monitor and support staff.

Importantly, as these managers note, organisations are experiencing a gear shift from 'emergency mode', which involved a rapid initial shift to using remote methods, to a more permanent integration of blended methods into their service provision under the 'new normal'. Therefore, ongoing evaluation of the sustainability of these working practices is necessary to find appropriate ways of supporting staff as they adjust to this new working environment. Such is particularly the case given problems retaining and recruiting specialist advisers in this sector.

One important aspect of this will be to consider how to maintain a sense of community within organisations whilst advisors are using blended models to provide advice. This is particularly crucial within the advice context, due to the nature of advice work and the toll that this work can have on advisors as they directly support clients:

"I think social isolation affected advisors a lot. Apart from obviously adapting their whole system, that's sort of like a side effect of remote working." (Debt Advisor)

"[I]f we don't support the staff and volunteers' wellbeing, we don't have a service to provide and therefore we're not doing the best for our clients. So no matter which advice methods we give, no matter how adaptable we can be, our fundamentals, we need to make sure that the advisors and the staff are supported."

(Welfare Benefits Advisor)

"Staff wellbeing is really important. And one of the things that is so difficult to see is 'what is the reason that somebody is having an off day?' If they're in the office, you can see that they've just seen a particularly difficult client. If they're only off when they first walk into the office, you can guess that it might be something happening at home. And that's what you don't pick up on in the same way when you're communicating by emails and phone calls." (Housing Advisor)

Several organisations had developed wellbeing initiatives to help advisors to feel connected and supported whilst working remotely as this advisor noted:

“We have a check-in in the morning, I open Zoom up so that kind of like is the same as walking into the office, hanging your coat up and sitting down at your desk and making a cup of tea, and then we do the same thing at the end of the day.” (Debt Advisor)

Although it is tempting to celebrate the potential opportunities of blended models, the associated challenges for staff development and wellbeing should not be underestimated. The nature of advice-giving work means that advisors often require a strong support system within the workplace, and this must be sustained if the benefits of blended advice are to be brought to fruition for the clients that they assist.

4.5 Effectiveness of blended models for meeting legal need

A consensus among organisations was that the efficacy of blended models hinged upon two major factors: the suitability of clients for blended advice, and the availability of appropriate resources to facilitate blended advice.

Suitability of clients for blended advice

Advisors were united on the point that advice-giving which incorporates any amount of remote contact was wholly inappropriate for digitally excluded client groups. Across **all three areas of law**, organisations noted a concerning absence of certain clients while organisations were relying mostly or completely on remote methods of advice-giving. Many advisors reported that traditional, recurring clients disappeared during the early stages of the pandemic, re-emerging only once their problems had escalated to a critical stage:

“Clients who have dropped off while we’ve been doing the remote methods tend to then re-engage at crisis point, and so we’ve lost quite a bit of time there that we could have been working with the client” (Debt Advisor)

“We were terrified because people just disappeared. Just did not know where they’d gone. And so we kind of feel that in the next couple of months, they’ll come out of the woodwork, having been evicted, and they’ve just been sleeping on people’s sofas, etc” (Housing Advisor)

"I think we found that a lot of our older clients and younger clients dropped off for a large period of time during the pandemic. But mainly, what we found was our most vulnerable clients were the ones we didn't see during the pandemic. And now, we are kind of offering a slightly more robust service where we can. We're starting to see them come back. So, the cases that we are getting are still not quite the same quantity of cases as we were pre-pandemic but they're more complex now."

(Welfare Benefits Advisor)

There is therefore significant concern about the risk of clients disengaging if traditional, face-to-face options are not available. Nevertheless, as discussed under 5.2, this finding exists simultaneously with that which demonstrates blended methods may go some way to reaching a broader range of disadvantaged clients, particularly those who have traditionally been excluded from services due to their **remote location** or by way of **certain disabilities**. Such concomitance is reflected in these focus group quotes:

"On the one hand, yes, we have digital exclusion issues for those people living in rurally isolated areas, but it also means that people who experience rural isolation not because of connectivity but because of buses, transport, disabilities, even social mobility... having the access to the remote provision is better for them."

(Debt Advisor)

However, another factor to consider is the adaptability of client groups especially when this conflicts with their perceived capabilities. This adaptability is something that advisors often articulated with regards to their clients as in the following:

"I was a bit concerned at first that people wouldn't be able to manage over the telephone because most of our clients are vulnerable, but they have adapted to it."

(Welfare Benefits Advisor)

Case Study 3, Jesse's Story – What is Lost without Face-to-Face Advice

Jesse contacted his advice organisation in the middle of a full lockdown, so his initial instructions were taken over the phone. Jesse had a learning disability and physical health issues. He did not read and write and so communication was difficult especially as he was unable to meet his advisor in person to begin with.

Jesse's issues were complex; there were questions about Jesse's capacity to litigate, there was a history of several years of allegations and counter allegations. Not meeting face-to-face at the beginning of the proceedings was very difficult for Jesse, and meant that it was only later in proceedings after further meetings and other expert assessments that his capacity stood out as an issue to his advisor. After finally meeting his advisor in person, Jesse's advisor was more concerned about his understanding of the proceedings and of the advice he had been given. The advisor felt that they had underestimated the extent of Jesse's physical disability which would have been obvious had they been able to meet in person.

Jesse's social worker helped him to communicate and send WhatsApp messages to his advisor. As all information had to be repeated and checked for understanding the telephone was their main means of communication, although the advisor followed up in writing for Jesse's records.

Not meeting in person also made it slightly more difficult to establish trust between Jesse and his advisor, as well as made it harder to identify capacity issues. Jesse said that it felt better once he had met his advisor in person. Following their experience with Jesse, his advisor has decided to still try and see initial clients face-to-face before making decisions on how to follow up.

In terms of **debt problems** particularly, focus groups revealed that organisations were also able to engage more effectively with **younger age groups** – who appeared to be engaging with services in greater numbers as a result of these new channels. And part of this emergence may be to do with the group of remote methods in a blended service. Although not a group traditionally understood as marginalised by services in the same way

as those in **rural areas** or with **disabilities**, this indicates the opportunities for blended advice to reach previously unseen areas of legal need:

“We’re seeing younger people. What we don’t know is whether we’ve got younger people with debt for the first time or whether they’re engaging with us because of the channels that we’ve opened up.” (Debt Advisor)

“We found young people, for example, are more happy to use things like WhatsApp or to send documents in that way and to discuss or have very short, punchy conversations.” (Housing Advisor)

Taken together, these insights suggest that blended models of advice have the potential to both increase and decrease engagement, depending on the needs and circumstances of their clients. Clearly, in **debt advice**, blended models enable organisations to reach a broader range of clients. Yet, at the same time, there is a real risk of other clients disengaging from services entirely if face-to-face provision is not an available option.

Resources to facilitate blended advice

When talking openly with advisors about the advantages and disadvantages of blended advice, conversations continually returned to issues of resources. While organisations have certainly innovated to work around pandemic-related restrictions and to improve their services for clients as much as possible, these efforts are ultimately constrained by the financial security of their organisations and the resources that are available to them.

While advisors were clearly motivated to provide a bespoke service to their clients in the future, they cautioned about the financial and workload implications of this:

“The problem that we found was that when we have gone back into on-site services and we’re trying to manage face-to-face and remote appointments, that has given us a much bigger admin burden.” (Debt Advisor)

Tailoring provision to individual client needs was an ideal that might be difficult to realise in practice. Throughout the focus groups, advisors were clearly concerned about how effectively they would be able to sustain their blended offerings within their current funding climate, which frequently relies on short-term competitive grant funding and high levels of

reporting requirements to ensure accountability. While advisors were keen to maximise their own efficiency through blended models, they emphasised that providing advice through different methods should not come at the expense of providing comprehensive, expert advice to each client that presents to their service. The point about needing to maintain a thorough service through adequate funding was clearly articulated in the following quote:

“A little bit of advice to a lot of people does not save the government money. Proper case work by a properly trained advisor, face-to-face with the time that we can put into it to really help people and resolve all of their surrounding issues is what saves money. Not just a little bit for a lot of people – that isn’t the way to do it. Neither for the client, for the advice service, nor for saving money.”

(Housing Advisor)

The issue of advisors being spread too thinly across different methods is therefore a significant challenge for the effectiveness of blended advice in practice. The extent to which the innovation and improvement opportunities associated with blended methods can truly be maximised, will undoubtedly hinge upon the availability of resources and the capacity of organisations to undertake longer-term financial planning.

Building on this, advisors were asked what kind of support might help to ease this pressure in the future. Across **all three areas of law**, advisors cautioned against the perception that remote advice can be treated as a like-for-like replacement for face-to-face advice. When discussing these concerns, the advisors were focused on the Ministry of Justice and wanted to ensure that policy-makers understood the reality of the situation as they saw it. Such sentiments are expressed in these examples:

“They [the Ministry of Justice] must not be seduced by sexy numbers. Because the fact is we saw a lot of people over the pandemic on the phone. But that was simply because people weren’t being evicted... it was a moratorium. I don’t want my figures to sort of seduce people into thinking that actually, ‘Oh, look, she replaced one method with another.’ I didn’t. I just got a whole new set of clients. And now that service has resumed. I’ve got to deal with this whole new set of clients plus my old clients. And that is going to be a challenge.” (Housing Advisor)

“I think our fear as a service is that when the [Ministry of Justice] is setting their budgets and thinking about how they’re going to fund these services, that they forget that the reason that we weren’t doing face-to-face is because there was guidance telling us to stay at home. It is fundamental [to remember] that the lockdown rules and restrictions stopped it... We didn’t choose not to... I think that’s probably going to be forgotten because I think a few people forgot what they weren’t allowed to do.” (Housing Advisor)

As these excerpts demonstrate, advisors felt strongly that a return to the mostly or entirely remote methods that they were required to use during the pandemic would be damaging for several client groups. As such, they emphasised the dangers of oversimplified assumptions about how advice can be offered, as well as the importance of recognising the various complexities associated with the new era of offering blended advice. In short, organisations are faced with the challenge of providing flexible, bespoke services to an even broader and more diverse range of clients who are experiencing legal need. While blended models do offer organisations some opportunities to improve the efficiency and quality of their services, their ability to maximise this will inevitably hinge on their financial security and the level of resources that they are able to draw upon in order to adapt to these different clients.

5. Findings: Clients

5.1 Key Findings

- Clients who had experience of receiving advice via blended delivery models were pleased with the way that this improved the flexibility of the service. This was particularly beneficial for clients who would have otherwise struggled to travel to a face-to-face appointment, including those with health problems and those for whom travel is expensive or arduous, and those with limited or unpredictable availability, including those with caring responsibilities.
- For many clients, the success of blended advice hinged on whether there were adequate opportunities to build rapport and personal relationships with advisors. While some remote methods may involve being directed to self-help guides or chat bots, the overwhelming message was that remote advice works most effectively when it involves an initial social interaction where the advisor is able to establish trust with their client.
- For some clients, blended advice models offered an opportunity to develop their capabilities and confidence. Many clients reported that they were willing and able to adapt when the circumstances demanded it, but again this hinged significantly on whether they were supported by an advisor they trusted and felt comfortable with.
- During interviews, the majority of clients focused on the disadvantages and barriers that they faced in relation to remote advice. In particular, clients reported that it was more difficult pragmatically to receive advice remotely when this involved communicating in writing, using technology, or if they needed assistance to navigate the variety of documents and correspondence associated with their legal problem.
- The most frequently cited barrier for clients using remote services was the lack of social interaction, which is important for building trust and rapport with advisors. Remote services were almost always perceived as inferior to face-to-face appointments because clients simply did not consider it as social exchange in the same manner.

5.2 Advantages of Blended Advice

During interviews with clients, the advantages associated with blended advice were broadly aligned with those that were reported by advisors. In particular, clients were pleased with the way that having the option to contact advisors remotely could make it easier for them to reach out to advice organisations, and made the process of receiving advice more flexible to their circumstances. For some, the specific strategies taken to blend remote advice with a degree of face-to-face contact also had the benefit of helping individuals to build confidence and capability for resolving their legal problems.

Accessibility of advice

From clients' perspectives, the most obvious benefit of blended delivery was that it could make it easier to seek help. Interviews with clients showed that utilising remote methods could facilitate making contact and keeping in touch with advisors. The most commonly cited reason for liking remote methods was the way it reduced or, even, removed the need to travel as in the following example that involves a client weighing up face-to-face against remote methods:

“I would prefer, out of the two, I would prefer on the phone than travelling.”

(Housing Client)

Having an option that did not involve travel could be more expedient but it could also be essential. Some could not afford the travel costs, whether through private motor vehicles or public transport. Others were unable to travel any significant distance due to ill-health or disability. Responsibilities, such as caring, may also tie people to their home and make visiting an organisation difficult. Below gives a flavour of how remote methods can help clients overcome such issues:

“It would have to be something within walking distance because I don't drive.”

(Welfare Benefits Client)

“More convenient because I couldn't actually travel because of my condition and what I was going through. So, it was a lifesaver for me to be honest.”

(Welfare Benefits and Housing Advice Client)

Flexibility of advice methods

Clients were generally open to a wide variety of remote methods and felt that different remote methods held different advantages. The following excerpts demonstrate the importance of providing variety in any blended delivery approach:

“I like a phone call because you can always make sure there’s nothing that’s not understood with talking to somebody. But with an email, you can always go back to it to check on the details.” (Debt and Housing Client)

“If they’re going to offer advice – different types of advice – don’t just keep it to telephone or email. Offer a web chat or offer, you know a conference call via Teams or Skype then.” (Debt Client)

When asked whether they understood the advice, clients generally replied in the affirmative but for many clients, the human element was key. While some remote methods may involve being directed to self-help guides or chat bots, the overwhelming message from clients was that remote can work as long as it involves a social interaction, as in the following example:

“[The advice] was always very clear and I was amazed at how easy it was to actually talk to a real person rather than continually, like a lot of places do, telling you to go online and look at the website.” (Debt and Housing Client)

“I felt like it was under control, like obviously someone’s helping me deal with it. Like whoever it was remotely or over [in person] because, you know, the main thing is the issue was, like I was getting help for the issue.”
(Welfare Benefits Client)

Importance of trust

A crucial element of why the social factor was important seemed to hinge on the ability to develop rapport and thus for the advisors to earn the client’s trust. Such judgments are easiest made face-to-face for many, and this highlights the value of remote methods forming part of a wider suite of blended delivery. For this client, their acceptance of later remote methods was largely premised on an initial face-to-face element:

“I know and I trust him more because I’ve met him face-to-face...It’s that first meeting, that point of first contact. There’s so much importance to me that I know what I’m dealing with.” (Housing Client)

Once these relationships are established, it is likely that the client would be reluctant to move on elsewhere and go through the same process again. Interviews showed the importance clients placed in establishing a relationship with the advisor; the foundational value of having met someone previously face-to-face but also the consistency of having dealt with the same person across the case. As such, when asked how confident they would feel getting remote advice in the future, a positive response from clients could depend on this history being in place:

“[I would be] very confident. Well, from the same organisation. Because, obviously, you know, I trust that organisation. I don’t want a different organisation.”
(Welfare Benefits Client)

“Yeah [I would use remote methods again].as long as I had the same person, like communication, because [the advisor] informed me all the steps in the way of what was going to happen. So, I felt in the loop. So as long as someone like that then I’d be happy to do it again remotely.” (Welfare Benefits Client)

Considering the isolation many felt during the pandemic, and especially with the inability or unwillingness to travel, the social element of the advice was highly valued by some of the clients. In the following example, the interview uncovered how important the support was to the client:

“I felt that very limited and isolated but having then [the advisor] who I was dealing with for a year, I felt, very, very safe and very confident in her ability to look after me...She did do very, very well.” (Welfare Benefits and Housing Client)

Ability to build confidence and capabilities

In addition to the social element being at the forefront of what made clients more open to using some types of remote advice, clients also considered how easy a method was to use. During interview, many clients reported that they had accumulated skills through needing to engage with remote advice. The following quote gives an example of how such

clients were able to learn new competencies that enabled them to ensure that remote advice could work for them:

“I struggled before but, like, I’ve learned now that I know how to attach a form or a letter to the email which I didn’t know before.” (Welfare Benefits Client)

For some clients, it seems that the pandemic has made a difference. They may have begun the process of seeking advice with low levels of confidence in communicating remotely, but have adjusted through necessity:

“Well, funny enough since the pandemic, it forced me into – I’m not that confident but with these times now it was like, yeah, you have to get into it.”
(Welfare Benefits Client)

It is important to note, though, that not all clients will find it acceptable to undertake such tasks remotely. For some, their agreement with blended delivery might revolve around what aspects will be remote and what parts can still take place face-to-face. The quote below expresses the kind of flexible, mixed approach that needs to be considered to gain wider acquiescence for blended delivery:

“It’s a mixture depending on if there’s no form or anything that needs to be posted...but if it’s just a few questions without any paperwork and it can be dealt with you know, then, yeah, it’ll be [okay] on the phone.” (Housing Client)

There will inevitably be some clients who are competent and confident to work themselves online but, among those that we interviewed, it was having an advisor at the other end of the telephone or video call that made the difference. It was dealing with another person that made remote advice a viable part of blended delivery for them. However, there was not universal consensus of the success of remote methods, and clients were keen to emphasise the disadvantages of these during interviews.

5.3 Disadvantages of Blended Advice

While section 5.2 showed the advantages of incorporating remote methods in blended advice for clients, overall the interviews revealed a greater number of disadvantages from a client perspective. These perceptions hinged most commonly upon barriers to building

trust with advisors, as well as to building confidence and capability to resolve their legal problems.

Barriers to building trust

The social element of advice-giving was a key element here, with clients generally expressing a preference for face-to-face interaction because it allowed them to develop rapport and build trust in a way that was difficult to replicate through purely remote methods. The following excerpts give an indication of how fundamental this stance on being able to judge someone face-to-face was for clients, particularly those in housing law:

“Yeah it is nice to...be face-to-face and see who you’re dealing with but again, you know, you can’t tell what a person’s like over the phone. You know, if they’re helpful or they’re just sort of going through the motions.” (Housing Client)

“I mean, [it’s] much better to talk to someone face-to-face. You get a far better impression of things and of the person themselves, you know.” (Housing Client)

One aspect where remote methods fall short for clients is in the consideration of documentation. During interviews, clients frequently explained that talking through paperwork was easier face-to-face. Again, this was particularly crucial for housing law clients due to the need for advisors to piece together various correspondence to assist with these problems:

“If it’s a lot of paperwork and you don’t understand it then I think, you know, the face-to-face would be better.” (Housing Client)

“I do think it was a lot easier face-to-face, you know, so you can, you’ve got all the paperwork in front of us.” (Housing Client)

Despite the fact that various organisations had developed systems for managing paperwork, not all clients found these beneficial:

“I’d rather meet with somebody and take the papers and so on. I mean, I’ve been told to send the papers in beforehand. But then again, you need to be able to explain to a certain extent what the papers mean.” (Housing Client)

Beyond the functional value of face-to-face services, the importance of human contact for many clients was clear. They are often dealing with highly stressful situations, working through issues that are of great importance to them. Sometimes, they are marginalised and feel that the world is against them. The role of human interaction in diffusing the anxiety and making them feel supported can be crucial. Being with another human being can take on huge significance over and above helping the client with the legal matter at hand. The following example expresses some of this greater value:

“I suffer with mental health and I do struggle getting out, going out so it’s one of these where I can use things like that to push myself, you know. I get an appointment, I’ll know, right, say a week or so in advance so I can sort of use it to push myself to go out, get myself ready.” (Housing Client)

Although some clients found value in remote methods that allowed them to speak with someone, for others, remote services were always inferior to face-to-face because they simply did not consider it as social exchange in the same manner. For example, the following clients were dissatisfied by mediated contact:

“But it’s hard doing it on this [telephone] because I’m not talking. I’m looking at you but technically I’m not talking to anybody if you know what I mean.”
(Housing Client)

“Because I find sometimes even having a verbal conversation on the phone, you can’t, you can’t see the person, you can’t convey body language.” (Debt Client)

Case Study 4, Viv’s Story – The Need for Face-to-Face Advice

Viv initially sought advice in respect of her housing issue. She initially met her advisor in person on the duty solicitor scheme and it became evident that she needed advice on an underlying Universal Credit issue which was itself linked to a right to reside issue.

She had been seen at the duty solicitor scheme due to rent arrears, which had arisen as a result of Universal Credit not being in payment. This was not in payment due to an issue with the right to reside. Viv had mental health problems and had not been able to trust or work with an advisor who had tried to assist with the Universal Credit issue. She had also been seen at the foodbank before the outbreak of the Covid-19 pandemic and had struggled to work with advisors. The issue with immigration and benefits needed to be resolved to avoid eviction.

Viv received advice in person before the pandemic. She was suffering from paranoia and would not have been able to engage if her advice service had needed to use phone or email. She believed that others listened in to her phone and may not have coped if face-to-face advice had not been available. The possession proceedings were adjourned throughout the pandemic. The tribunal case was initially due to go ahead online but her advisor helped Viv to request this be changed to face-to-face as Viv needed to be there to explain herself. Viv's advisor also helped Viv to apply for settled status.

Face-to-face advice at a location where Viv felt comfortable was essential in this matter. She gave instructions with the help of a litigation friend in person. It was only when Viv was face-to-face at a court hearing that advice was sought due to mistrust of advisors and mental health issues. If this hearing had gone ahead remotely without Viv present or without duty advice the other issues would not have been identified.

Barriers to confidence and capability

Many clients appeared to assume that speaking with someone on a telephone was the standard remote method. This resulted from it being the experience of most clients that we interviewed – and in particular, as the part that stood out for them (over and above emails or WhatsApp messages) because it represented the part of the service where they most obviously engaged with the advisor. That interaction made it more memorable. Despite that consideration, there were wider concerns around the use of technology that represented a disadvantage of blended advice for many clients.

Written communication could be problematic. Clients reported that they could find it harder to express themselves via email, where they can't convey their meaning as they would

have been able to via speech. Similarly, clients explained that they could find it harder to understand what the advisor was telling them, which was exacerbated by the client being less likely to ask follow up questions via email. Some of the concerns around such exchanges are captured here:

“Sometimes [the advisor] has written something to me that she might understand because it’s legal and I’ve looked at it and I’m thinking, ‘Well, what’s that? Does that make sense?’ And I’m pretty good at reading most legalese...But there are certain times that I’ve looked at them and I’m thinking, “What does that mean – does that actually come from my situation?” (Debt Client)

“I think people misunderstand the email fairly frequently. I really do. A lot of time they keep resending them trying to explain different ways.” (Housing Client)

Some clients – especially the older people amongst the sample – suggested that **age** could be a factor when it came to using technology. Interviews often involved such clients telling us that remote methods might be suitable for younger generations but that it was awkward, mystifying or scary for them. Despite clients trying to adapt, some simply found this too difficult when the application of technology was so alien to them:

“It’s really difficult for somebody at my age to get the radar on all these technologies” (Housing Client)

“For the younger generation, they’re used to it. I mean, you’ve got to remember, we didn’t have any computers and sort of all that, you know? I mean, Christ, we used to write a letter.” (Housing Client)

There were also other difficulties identified in the interviews. These revealed that **ill-health, disabilities** and **remote locations** could work to inhibit access for clients. While focus groups with advisors suggested that some of these clients might be more suited to remote advice, interviews with clients revealed that for others, these factors may make remote advice even more challenging:

“I couldn’t do a video call because of the loss of my sight in my right eye.”
(Welfare Benefits and Housing Client)

“Well, sending them by email is very difficult for me. Any case because the signal just doesn’t hold up.” (Housing Client)

Taking this together, not every client has the same ability to use a given technology, and the shift to blended advice is a cause for concern for those clients who felt that greater reliance on remote methods might shut them out from being able to access advice.

While there were advantages and disadvantages, the interviews involved clients spending a lot more time talking about the latter. There were concerns about the development of remote methods, which need to be taken seriously in terms of future evaluations of how blended methods are to be regularly utilised in the sector.

6. The Future of Blended Advice

6.1 Key Findings

- As we consider how to move forward with blended provision, it is important to recognise that there are no easy answers on what that should look like. As such, the balance between remote and face-to-face methods should be considered with care, as this research suggests that there are rarely clear-cut categories of client or problem. Those working in the sector will need to be collaborative, adaptable, and flexible in order to match appropriate advice-giving methods with the needs of their clients.
- It is important not to target advice models towards clients based on simplified assumptions. These research findings have emphasised the importance of retaining awareness of the possible differences that arise within client populations and legal problems and, crucially, to ask individual clients what they require. This creates significant complexity and further organisational and logistical challenges for advice organisations, as it is now necessary to offer bespoke services.
- If used appropriately, blended delivery can lead to circumstances in which clients find they can access advice in the way that works best for them and is therefore more effective overall. It may improve the client's experience, and thus their advice seeking behaviour in the future.
- Underpinning this is a vital need for further data and ongoing evaluation. Future research should be conducted across geographic locations, to include urban and rural areas, and must combine the voices of both advisors and clients, as each is vital to understanding the reality of the sector and how access to justice functions in practice.
- In one form or another, blended advice is here to stay. By rooting the development of blended models in the expertise of those on the frontline of advice provision, the potential value of these models can truly be maximised, with the best aspects of blended advice able to serve as building blocks to improve the advice sector and strengthen access to justice.

6.2 Recommendations for Future Advice Provision

Among advisors, there was a strong consensus that the rapid and unprecedented impact of the pandemic has facilitated a moment of reflection for the advice sector. In some ways, it has created further challenges to reaching marginalised and disadvantaged communities, and in others, it has created opportunities for meeting demand for legal need and improving the accessibility of services to certain groups. As we begin to consider what constitutes the ‘new normal’ as society works out how to live with COVID-19, these research findings have captured a moment of contemplation in the sector. Such a questioning, inquisitive spirit was expressed in the focus groups:

“It has really caused us to think about the robustness of our service and how people can access our service, how we provide services.” (Debt Advisor)

Across focus groups in all three areas of law, advisors felt that the future of advice-giving is likely to involve a blend of face-to-face and remote advice-giving methods. The overwhelming sentiment was that:

“Going back would almost be a step back.” (Debt Advisor)

While the drive was to think about how to move forward with blended provision, there were no easy answers on what that should look like. The task of determining the appropriate balance between remote and face-to-face advice when designing and implementing blended models is far from straightforward. Those working in the sector will need to be collaborative, adaptable, and flexible in order to match appropriate advice-giving methods with the needs of the clients that present to them.

Importantly, advisors identified a continued need for face-to-face advice provision, especially for vulnerable clients, who may be contending with mental health problems, limited resources, disabilities, or a range of other kinds of unpredictable circumstances which require more hands-on support. The focus groups highlighted that we are moving towards a world that includes technology but also preserves face-to-face for those that need it. Face-to-face cannot be forgotten in any rush towards technological advancement. Whatever additions technology can bring, there is and will remain a need for both:

“That’s not to say that there isn’t room for face-to-face and it isn’t important for some clients who can’t engage or, you know, prefer to be seen face-to-face. And obviously we’re doing the face-to-face at court... [it's] so important that we engage face-to-face with some of those clients. Because some of those services just can’t run virtually” (Housing Advisor)

“We’re talking quite broadly about the whole future for us as a service where the client groups that we see are incredibly vulnerable, and most of them require face-to-face advice and [for whom] casework in the long term is face-to-face.” (Housing Advisor)

Case Study 5, Jo’s Story – The Limitations of Remote Methods

Jo was referred to an advice service for assistance with an appeal against a finding by the Department for Work and Pensions that she was fit for work, and fit for work related activity within her Universal Credit claim. She had multiple serious health issues which prevented her from being able to live a normal day-to-day life. Jo rarely left the house, only doing so when absolutely necessary and always accompanied by a family member. Jo was too unwell to travel to the advice service and further, she did not speak English. Therefore, remote assistance was necessary but this was further hampered by the fact that she did not have a laptop, computer or smartphone so video conferencing was not possible. This only left the telephone.

Once Jo’s advisor had the appeal bundle, they arranged a time with one of Jo’s family members to sit with her so as to interpret the questions they had and to obtain responses so that they could draft submissions. This took place over four separate calls to make sure that they had captured all of the problems that she was experiencing. This process would have been easier if Jo had access to IT facilities; or if she had been well enough to attend the advice service in-person with a trusted family member. Having to use just the telephone without any visual clues made drafting the submissions more difficult and took longer.

The hearing of Jo's appeal was listed as a remote video hearing. The family were advised that they could dial in but it would be preferable if someone could assist with enabling Jo to link via video to the hearing. One of the family members was able to use their smartphone for this. However, the tribunal experienced difficulties with their IT. The interpreter was unable to join via video and therefore had to be put on loudspeaker. It took 30 minutes for these technical issues to be sorted out and even then, the voice of the interpreter was very faint and Jo had great difficulty hearing her. The judge was apologetic but rather than adjourn the hearing, wanted to press ahead as any further delay would prejudice Jo's financial situation. The appeal was allowed and Jo was found to be both unfit for work and unfit to undertake work related activity.

Language barriers, amongst other things, can be a real barrier for remote working. This is especially so where funds are not available for independent interpreting services. Further, although Jo was fortunate to have family available, this isn't always the case and this can give rise to issues of confidentiality when relying on third parties to interpret. If Jo could have attended the advice service in-person, or had a laptop with functioning internet, and had the tribunal been working well, she would have been less anxious and less confused.

This research project was conducted at a time when restrictions were gradually being lifted across England and Wales, meaning that advice organisations were returning to varying levels of face-to-face provision. Decisions therefore needed to be made about whether some groups needed to be prioritised in the reintroduction of face-to-face advice, and such calls help inform discussions about who may most require face-to-face services as the shift to a permanent state of blended advice becomes established. The below quotes from across the focus groups provide an insight of the kind of considerations that advisors are making when thinking about how to best use face-to-face as part of their blended service:

“Although we're not necessarily prioritising face-to-face advice for any specific groups or special [categories], we're actually thinking about people who don't have the resource to access [remote services].” (Debt Advisor)

“We are really working in a quite a big hybrid way and we’re prioritising our face-to-face appointments for vulnerable clients.” (Housing Advisor)

Vulnerability is the key issue here; prioritising face-to-face services for those who are most likely to need it.

While it is possible to identify some emerging themes, such as the implication that remote methods may be easier for those clients living in **rural areas**, this research has revealed the importance of not being too prescriptive about who might hold which attitudes towards different methods based on prejudice and conjecture. Two disabled people may experience what has been labelled the same difficulty in varying ways that create contrasting views on remote advice. Two older people may have distinct levels of skills and confidence in using technology. Two people who speak English as a second language may have contradicting approaches to whether they feel more comfortable speaking that language face-to-face or remotely. It is important not to target advice models towards clients based on simplified assumptions. Rather, these research findings have emphasised the importance of retaining awareness of the possible differences that arise within client populations and legal problems and, crucially, to ask individual clients what they require. This creates significant complexity and further organisational and logistical challenges for advice organisations, as it is now necessary to offer bespoke services that assess client needs at the point they present to services. The client must always be put first:

“Although most people that we would offer face-to-face to would fit in, you know, those [vulnerable] categories, it's more about the person themselves. So, we couldn't prioritise the group. It would just be the person, based on their capability and resources.” (Welfare Benefits Advisor)

“Let’s ensure it’s client-centred and not a rush to a vanilla-type delivery that is low cost, high volume.” (Housing Advisor)

“I think just as a self-assessment really of our service, is that we got into the habit of kind of almost making the decision for the client of what they needed in terms of the way they access the service. And I think that's mainly due to the pandemic and where we had no choice...So, I think we've had to regroup ourselves in terms of asking the question, 'What would you prefer? If we can facilitate face-to-face,

would you like it? If we can't, this is what we can offer'. And I think we, as a service, had to come back... [to] actually offering what the client wants as well as what they need and that was quite difficult." (Welfare Benefits Advisor)

A fundamental point that emerged from the research is that there can be no one size fits all approach when it comes to blended advice models.

Looking to the future, and how the balance between remote and face-to-face advice should be struck when designing and implementing blended models, advisors called for a specific focus on outcomes for clients – what the method can do to give them agency and help them move forward with their lives. While part of this will inevitably involve finding ways to work more efficiently, it was clear that a major factor in the effectiveness of advice-giving methods was identifying what and how methods could be used to empower clients within the advice process.

"The outcome is whatever you do should be tested with the clients and they should be the centre of attention, not we thinking what is the quickest and most efficient of delivering advice." (Debt Advisor)

Blended advice creates the possibility for giving more options to clients. If it is used appropriately, the incorporation of remote methods on top of face-to-face provision need not obstruct clients nor force them into a service they do not want. Blended delivery can lead to circumstances in which clients find they can access advice in the way that works best for them and is therefore more effective overall. It may improve the client's experience, and thus their advice seeking behaviour in the future:

"It's also a no-brainer for clients that they need to be given choices. And if they're given choices they're also given more choice and ownership of the kind of help that they're getting, which is what most of us are all about, it's not about doing it for them, it's about doing it with them, it's about empowering them." (Debt Advisor)

Case Study 6, Corin's Story – Balancing Face-to-Face and Remote Methods

Corin telephoned her advice service during the festive period after being told by the Department for Work and Pensions that she had received an overpayment of benefit and that she must repay this, as well as a Civil Penalty of £50. She was told that she needed to respond within two weeks. At the time, the office of the advice service was only partially open because of the increased Covid-19 infection rate, with a skeleton staff in the office. Corin's call was taken by our receptionist, who was answering the phones from her own home. An advisor rang Corin back the following afternoon and asked her to send a photo of the DWP letter by email, arranging to speak again on the following Monday.

Corin was a lone parent, who had suffered from Multiple Sclerosis for the last 10 years. Corin therefore found it useful to communicate as much as possible by email and telephone, although as Corin needed to let her advisor see a large number of bank statements they did arrange one face-to-face meeting with her, as it would have been impractical and insecure to send copies by email. This required flexibility on the part of the advice service, as although Corin was able to attend on the second attempt, she had been too tired and weak on the first occasion.

As Corin was in receipt of Universal Credit, she could contact the DWP via her online 'journal', so her advisor recommended that she send a message to ask for more time to respond, as the advice service was partially closed because of government advice and the period of time given to Corin to respond included Christmas and New Year's Eve. When this was refused, the advice service emailed Corin a direct message from themselves to add to her online journal giving their name, qualification (solicitor) and organisation's name. In this message, her advisor set out why it was unreasonable to refuse to an extension of time, particularly as the DWP were considering imposing a Civil Penalty. This was the only way that the advisor could communicate with the DWP in time as letters to the Universal Credit department do not appear on their system for a couple of weeks. It resulted in a two-week extension for Corin, and she also received a phone call from a decision maker.

It was useful for Corin to see her advisor face-to-face at least once, and the sending of bulky or personal documents by email is impractical or insecure, but otherwise email and phone worked effectively and made it easier for Corin to engage.

In cases where there is a suggestion of wrong-doing, failure to notify the DWP of relevant information or failing to disclose relevant documents, face-to-face communication is helpful at least once. Cases like Corin's often include appeals relating to large benefit overpayments or even fraud investigations and being able to speak face-to-face can be helpful for advisors to be able to assess the strength of the case and how good a witness a client will be.

There are, nevertheless, barriers to realising the potential of blended advice. When looking to the future, there were two major anxieties for advisors: workload, and funding. These are ongoing issues, the problematic nature of which has been exacerbated by the pandemic and may yet get worse as we move forward, and deal with the implications of COVID-19 on society more broadly and the sector specifically. These growing, entwined issues were worrying for advisors:

"It comes to a point where you have to think about the team's capacity to continue offering advice...it requires more time and more effort to go into it. Unfortunately... we can't without more funding." (Welfare Benefits Advisor)

For **housing law** in particular, workload concerns emerged in the focus groups as advisors relayed pronounced concerns worried about levels of demand having increased. The advisors here were worried about the impact of the pandemic on their clients, a fall-out that is going to have to be managed for the foreseeable future especially considering the cost of living crisis:

"The proportion of new clients for us with housing issues is quite high at the moment. And I think it's pandemic based really. That's not obviously the only reason why people are facing housing issues at the moment, but it is a starkly different reason than we've seen...before the pandemic." (Housing Advisor)

“We are seeing people with massive rent arrears forty thousand pounds plus. And these were people who made rational decisions prior to the pandemic to purchase property that now, as a result of the pandemic, just can’t afford to stay there... and they tend to be private tenants, mortgage, people with mortgages. So there are a whole new category of clients that we’ve never seen before and we never would give a priority to in the past...they’re desperate as anybody else. And for us, because of the way the cost of living is, I anticipate that client group staying with us for a good while longer now.” (Housing Advisor)

Such funding concerns are long-standing; the sector has struggled financially even before the pandemic, especially with the impact of austerity in the previous decade. The pandemic has exacerbated these funding problems, bringing with it an increased reliance on grants as a funding source – which are inherently short-term in nature and do not create stable working conditions due to their invariably competitive nature.

“We’re a housing organisation, more than two thirds of our funding lost over the pandemic. Because quite rightly people weren’t being evicted...So for the first time in many years is we relied on grant funding. Grant funding was the bulk of our funding throughout the whole of the pandemic. Now we need to start planning our resources to meet the really expanded demand for legal aid work, etc. However, we don’t have any foundation upon which to build that work because we’ve not laid down much earned income over the past couple of years...But the problem here for us is the uncertainty is the, you know, we planned last year for the courts to open in September. They didn’t. So for the past two years, every budget that I’ve set is within a month or two turned out to be a waste of my time. And that’s really difficult because the main bedrock of our service is the staff. Once staff start to feel insecure, they’ll go.” (Housing Advisor)

The specific points raised here could be placed in the wider context of anxieties around sector sustainability and difficulties recruiting and retaining specialist advisors to the sector. Concerns around workload and funding restricted the ability of organisations to innovate and develop blended advice. For advisors, it was difficult to plan and prepare, and whatever potential benefits blended advice offered may not be realised by the way their advice organisations would be inhibited in their application of blended advice. There

was also the possible danger thereafter that the downsides that come with moving to more remote methods might not be able to be mitigated. Advisors in the focus groups outlined how they would be held back by these concerns:

“I’ve certainly noticed that it’s become more difficult to look for funding other than legal aid funding...normally by this point in the year, you’ve got indications from some of the usual big funders about what they’re going to continue funding or funding they might have available. And we’re seeing very, very little of that. Which is making it more difficult to forward plan. And obviously making sure that we’re looking after staff, clients and business, it becomes more difficult to plan in that way.” (Housing Advisor)

Understanding how to manage blended advice for the good of all in the advice sector will require more research. Big changes have occurred over the pandemic: organisations have implemented new systems, advisors have developed new working practices, and clients have adapted to a new form of provision. These research findings indicate that the sector will need to ensure accessibility and flexibility across blended methods to ensure that they can be deployed in a way that works for the broad range of clients who get advice. Further, there is an important need to acknowledge the workload and funding implications of developing and implementing blended models to ensure advisors are adequately resourced and supported. The overwhelming message that emerged from this research was that there is no going back – and that the positive changes that have occurred should be embraced, whilst the associated challenges should be mitigated:

“We’ve opened up all those channels, what a shame to just close them down on the basis of an assumption.” (Debt Advisor)

6.3 Recommendations for Future Research and Evaluations

While this project was contained to just three areas of law and was conducted at a specific point in time, it nevertheless provides a starting point from which such future research can develop and extend our findings. In particular, this project highlights the benefits of conducting research that cuts across different areas of advice provision rather than considering different areas of law in isolation. Examining **debt law**, **housing law** and **welfare benefits law** holistically has allowed this research to extract specific insight from each area of law in addition to identifying commonalities across the sector. As such, the research team strongly encourage further investigations into other areas of law such as **criminal justice**, **employment**, **family**, and **immigration** and **asylum**, which are anticipated to improve understanding the applicability of blended advice for all. There is also scope for moving beyond advice for comparative research that looks at other areas that have shifted to a blended provision over the pandemic such as health services.

Methodologically speaking, such future research must also seek to combine the voices of both advisors and clients. As demonstrated throughout this report, each is vital to understanding the reality of the sector and how access to justice functions in practice. While there is certainly academic scholarship that examines the provision of legal advice, the views and perceptions of these population groups are rarely sought out when it comes to policy formulations. Due to pragmatic and ethical challenges, there are even fewer examples of research conducted with clients, and it was obvious from client interviews that those who rely on the advice sector are not used to having their experiences taken seriously by those outside the sector. Clients are, of course, those with the greatest stake in the operation of a sector with a material impact on their lives.

Potential methodological innovations that may be considered for future studies could include, for example, additional advisor interviews to deepen the insight produced from these focus groups. Similarly, interviews with clients might productively be extended with an additional diary component where clients are given greater opportunity to outline their experiences and express their perspectives in their own words. Understanding of both advisors and clients might also be improved with an element of observation, whereby researchers are present during adviser-client interactions. This would enable access to the lived reality of blended advice, providing opportunities to identify detail in the moment that

may not be apparent from after-the-matter accounts such as case studies, interviews and focus groups. In these ways, it is possible to build on the initial insights into blended models outlined in this report.

Future research should additionally be conducted across geographic locations, to include urban and rural areas. While some variation might be predictable, other differences may not always match expectations. Underpinning this is a need for evaluations that considers the scope of blended advice provision across a range of **linguistically and culturally diverse locales** – exploring issues such as how might a first-language Welsh speaking population in north-west Wales respond differently to face-to-face advice within and from their community compared to remote advice from a distant town with a predominantly English-speaking demographic. The stories of clients with different **disabilities** or **illnesses** should be considered so as to draw out the multitude of lived experiences and how they affect the receipt of advice across different blended models. **Socio-economic conditions** and varying levels of capital (financial but also social and cultural) should be explored to see how these impact upon what methods of blended delivery can work in varying contexts, whether the ‘sharp-elbowed’ are more likely to get ahead when remote advice comes into play. There are many possible variables and the research project presented in this report can only scratch the surface.

The research findings presented in this report provide a novel and important contribution to an under-researched and still-emerging context of advice provision after the COVID-19 pandemic. Importantly, it provides a resource for decision-makers who are seeking to make plans for the future of the sector. In the ethos of providing a vital starting point for future research and evaluation into blended advice models, this report has also provided crucial considerations that must be borne in mind when deciding how to develop blended delivery for the future – because, in one form or another, it is clear that blended advice is here to stay. By rooting the development of blended models in the expertise of those on the frontline of advice provision, the potential value of these models can truly be maximised, with the best aspects of blended advice able to serve as building blocks to improve the advice sector and strengthen access to justice.

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Appendix A

Literature Review Resources

The tables contained in this Appendix contain the details of the resources included in the literature review. The first of these involves the jurisdiction that the research focuses on. Where two jurisdictions are discussed, both are noted but where more than this are considered, the work is categorised as ‘various’. The second table contains the number of resources considered on each subject matter and the final table shows the type of resource reviewed.

Literature review – study jurisdiction

Jurisdiction	Australia	Canada	England & Wales	The Netherlands	New Zealand	Northern Ireland	Scotland	United Kingdom	United States of America	Various
Number of Resources	8	2	34	2	1	2	2	19	11	10

Literature review – subject matter

Subject Area	Asylum	Civil	Counselling	Criminal	Debt	Delivery of Government Services	Family	General Blended Legal Advice	Healthcare
Number of Resources	2	2	4	10	5	1	7	11	9

Subject Area	Higher Education	Housing	Immigration	School Education	Social Housing	Social Security	Social Work	Welfare Benefits
Number of Resources	2	8	1	7	2	1	4	12

Literature review – study type

Resource Type	Resource Guide	Journal Article	Report	Web Post	Book	Book Chapter	Newspaper Article	Website
Number of Resources	1	45	25	1	2	3	1	1

Resource Type	Policy Briefing	Factsheet	Web Article	Systematic Review	Guidance	Position Statement
Number of Resources	1	2	3	1	1	1