

CASE STUDY: Moving towards a new 'North Lanarkshire Advice Network'



An information and advice forum was originally established in 2000 following the first review of information and advice services. Services were further reviewed in 2016 and this has resulted in a refresh of the aims and objectives of the forum to establish a new and improved 'North Lanarkshire Advice Network'.

Advice Services budgets reduced significantly in 2017/18 and continue to be under review. This has been the driver for partners to take action to consider how they deliver services across the local authority area and how they work in partnership to address local need.

The network consists of welfare rights, money advice, local authority, housing, revenues, social work and other key council partners, citizen's advice bureaux and other independent services. [Click here for referral partners and advice provision](#). The council chairs and co-ordinates the network, sets the agenda and prepares the minutes, and all partners are asked to contribute ideas for this. Marian Tobin, Coatbridge CAB Manager is vice chair.

Listen to what John Campbell, Financial Inclusion Manager and chair of the forum has to say:



[Video: John Campbell - Introduction](#)



[Video: John Campbell - Review](#)

The Challenge

Cuts from the Scottish Government budget has resulted in North Lanarkshire Council having to find savings for 2017/18.

The Financial Inclusion Manager presented a report to elected members to make them more aware of the importance and benefits of the information and advice services as they faced a challenging time under the budget setting process ([download the report](#) that went to committee in September 2016).

It is likely that the number of people affected by welfare reform will continue to increase and as Scotland sees a new social security assessment process introduced, it is expected that demand for services will continue to grow. Universal Credit will be introduced in North Lanarkshire in April 2018.

There was no structure formally supporting joint working across information and advice services; this meant that partners hadn't been communicating and keeping each other informed of their funding bids and had resulted in some duplication across the local area.

These challenges all helped to make a strong case for more effective partnership working, making best use of resources and to

CASE STUDY:
Moving towards a new
'North Lanarkshire
Advice Network'

help improve access to services for the people who need them most.



Video: John Campbell - Challenges

Intended Outcomes

The creation of the forum was initially intended to bring consistency in reporting and it soon became a priority for partners to make better use of technology and IT systems, recognising that different providers used different systems for case recording and reporting each having different capabilities. The aim was to bring consistency in reporting and enhance each other's services, filling gaps rather than duplicating services.

During the review of the partnership, all information and advice services were interviewed by council officers. The [feedback from partners](#) suggested that there needed to be more accountability and responsibility for the services provided with a commitment to the shared objectives of a partnership agreement.

Action/Approach Taken

Two short life working groups were created to help with the review of the partnership: one group to look at the 'commissioning approach for information and advice services' chaired by John Campbell, Financial Inclusion Manager, and the other group to review the 'partnership agreement', which was chaired by Marian Tobin, Coatbridge CAB Manager.

The partnership is now looking to have information and advice provision across each of its six localities with representation from one independent service and one council service to allow for client choice.

More effort is being made to look at the type of information the network can access through other council services to drill down to each neighbourhood area and identify need and demand across the localities. Partners have been asked to sign formal partnership agreements and were asked to seek approval from their individual committee board members.

Marian Tobin, Coatbridge CAB Manager and vice chair of the forum, says, "I've been involved with the short life working group to redefine the partnership agreement which should hopefully result in a more joined up approach".

A number of commissioning approaches across the UK were considered as part of this review. Aaliya Seyal, Airdrie CAB Manager and member of the commissioning short life working group, says, "it is a difficult time for partners as North Lanarkshire Council is undertaking a review of information and advice services and there will be some difficult decisions to be made.

"The short life working group has worked well and provided a great opportunity for providers to share their views."

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Marian Tobin,
Coatbridge Citizens Advice
Bureau Manager

CASE STUDY:
Moving towards a new
'North Lanarkshire
Advice Network'

Organisations can apply to become a member of the network but the condition is that they must be able to take on referrals and agree to the referral protocol

Obstacles and Issues

North Lanarkshire has high levels of deprivation. The Scottish Index of Multiple Deprivation shows that there are 104 datazones within the 15% most deprived communities nationally. Within the 15%, there are 30 datazones that are within the most severely deprived communities i.e. in the bottom 5% nationally. There are high numbers of applications to the Scottish Welfare Fund compared to other areas in Scotland

The partnership has had to take steps to reduce areas of duplication and ensure that services can be delivered and accessible where people need them most. It has also had to look at improving on the referral process.

Marian says, "The foodbank referral pathway driven by North Lanarkshire Council helped evidence the important benefits which can be achieved and it helped encourage partners to buy into the improved referral process". [Click here to read more about this initiative.](#)

The North Lanarkshire Fairness Commission was established to investigate issues of poverty and inequality and make recommendations to the council and its community planning partners for future action. This will become a major focus for the network going forward.

Results

The creation of the network has achieved good partnership working. Listen to what John has to say.



Video: John Campbell - Achievements

Jack Young, Chair of Newmains Advice Centre and member of the welfare reform sub group said, "Being part of the network gives people the chance to work as a team and share views and experiences on the best ways to help people".

It now has a formal referral pathway and the local authority financial inclusion team manages the YourMoney advice helpline and triage system for all contacts to the helpline and incoming and outgoing referrals within the partnership.

Partners now use a consistent [referral form](#). An online self-referral can be made to [YourMoney](#) and the partnership has branded materials to help with the promotion of the helpline which can be used by all front line services and in particular at community events.

Partners do not need to receive funding to be part of the network they just need to commit to making referrals. An example of this arrangement would be with the Department of Work and Pensions.

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Jack Young,
Chair of Newmains Advice
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CASE STUDY:
Moving towards a new
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Advice Network’

The network has established practitioner forums for front line money advice, welfare rights and housing practitioners. These forums create a space to raise issues being faced on the front line and provides some peer support. The practitioner forums are co-ordinated by third sector partners.

The network has generated £41m in benefits and it has helped to share knowledge and deliver four learning exchange events in the last five years. It has arranged for keynote speakers from the parliamentary welfare reform committee, various MSP’ and MPs to speak at [events](#).

The Chief Executive Officer and Leader of North Lanarkshire Council have actively been involved at the events around welfare reform, poverty and deprivation and recognises that partners are working together to make a difference to people’s lives.

The network provides representation within the council corporate welfare reform group and the officer’s welfare reform working group.

Lessons Learned

The catalyst has been the review of the information and advice services. People need to be involved and consulted with under any review and there has to be some leadership and influencing role.

The learning from the partnership short life working group evidenced that it is important to have a clear terms of reference and set of shared objectives but more importantly review these arrangements regularly to ensure that all partners are bought in to and able to meet the objectives.

Next Steps

The short life working group has finalised an application for the purpose of the new commissioning approach and this will be issued to partners in August 2017 with an invitation to make an application for future funding.

A new weighted matrix scoring system has been introduced and new service specification and service level agreements will be introduced for each locality with new monitoring arrangements.

A funding partnership agreement is being finalised for members to sign up to.

There will be a dedicated day allocated by the council for answering any questions partners may have on the application form and process.

Successful and unsuccessful partners will be notified and exit strategy meetings will take place.

A report will go to the Council Executive Committee ‘Infrastructure (Regulatory Services and Waste Solutions) for approval in November 2017. Any activity which needs to be approved through the financial inclusion team will also go to the Health and Social Care board for information.

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Aaliya Seyal,
Airdrie Citizens Advice Bureau
Manager

**CASE STUDY:
Moving towards a new
'North Lanarkshire
Advice Network'**

The council external funding officer will be invited along to an event to help assist any organisations who may need support to apply for resources from alternative funders.

There will be a funding sub group created for the network to encourage a more joined up approach to funding.

There will be a launch event held in September 2017 to raise awareness and promote the new North Lanarkshire Advice Network.

The new funding stream will take effect from April 2018.

The network will develop an action plan going forward to reflect the new aims and objectives of the network, monitor this at each network meeting with an annual review to evaluate the effectiveness.

The council will share its on-line training package with partners.

A tackling poverty strategy will be developed with a commitment from the partnership to continue to work together under the new model.

Partners will make referrals in line with [Scottish National Standards for Information and Advice Providers](#).

There will be closer partnership working to run events and initiatives in the community and participation in themed week events.

Aaliya also says, "The network should focus on the issues that communities are presenting with and look collectively at how to address them. The refreshed partnership working should look at the overall advice provision and demand and pool resource when needed. It's about improving our collaborative approach to help our clients as we are all working to the same shared objectives."



Video: John Campbell - Next Steps

Any Other Information

The network may also wish to consider whether it should develop a separate marketing brand or keep in line with the current YourMoney brand.

It will work closely with the community planning team and do more community profiling and research to help build the evidence base and take a more 'needs based approach' for the services that need to be delivered.

The review of the information and advice services has also meant that the North Lanarkshire Council internal advice services had been reviewed, resulting in service restructure and redesign. Advice staff have now merged to the Financial Inclusion Team resulting in some changes with all staff now working in health and social care settings.