



Scottish Local Authorities' Commissioning Approaches for Advice Services in 2017/18 and Onwards



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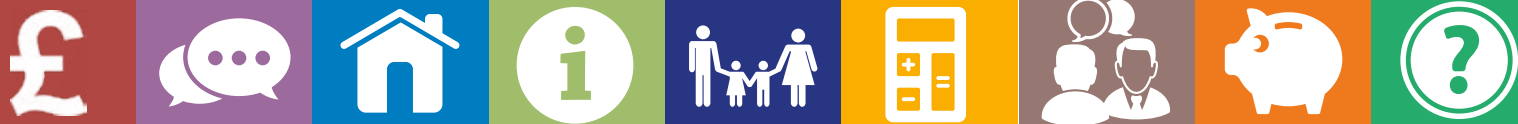
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Executive Summary

This report details the findings of the Improvement Service's (IS) review of the commissioning approaches used for advice services across all 32 Scottish local authorities. It focuses on the approaches adopted in 2017/18, as well as those that will be implemented in 2018/19 and onwards. 'Commissioning' is defined as the process via which organisations plan, procure, deliver, and evaluate advice services.

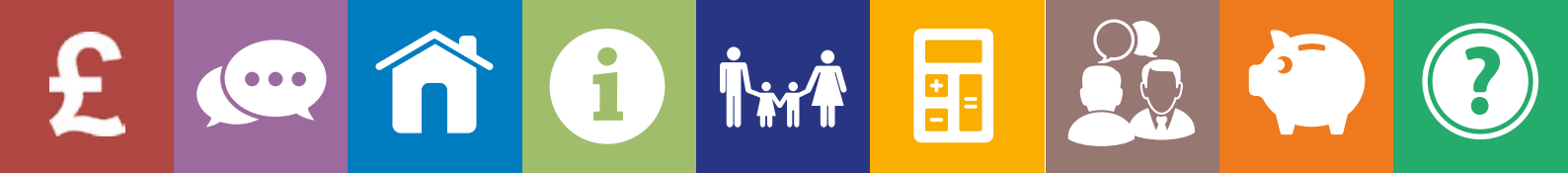
This review forms part of a series of publications by the IS to track local authorities' progress towards embedding the principles of the Framework for Public Funding of Advice,¹ which was launched with ministerial support in 2015. Developed in partnership with the Scottish Government and Scottish Legal Aid Board (SLAB), the framework details the key elements that funders should consider when reviewing their current commissioning arrangements with advice services and when funding new projects. By following these elements, local authorities can be confident that they are operating in line with best practice. Going forward, the information gathered throughout this review will be used to identify areas of good practice, as well as where additional support is required.

The key findings from the review are outlined below.

Type of Funding Model

- In 2017/18, 25 local authorities funded advice services through grant-funded agreements, four via a formal contractual agreement, and two via a formal consortium contract and one funds in-house provision only.
- In 2018/19, 21 local authorities are funding advice services through grant-funded agreements, seven via a formal contractual agreement, and two via a formal consortium contract and one local authority is yet to confirm its new commissioning model whilst one funds in-house provision only.
- Two local authorities have confirmed that they are considering moving from a grant-funded model to a formal contract and tendering process for 2019/2020.
- Four local authorities will be tendering for a new advice services contract in May, July, October, and December 2018.
- As of 2018/19, 17 local authorities have implemented longer-term funding arrangements – most commonly for three-year periods.
- One local authority withdrew local authority and matched European Social Fund investment from external services in 2017/18 due to issues of non-compliance and providing poor value for money.

1 www.improvementservice.org.uk/documents/money_advice/Framework-for-Public-Funding-of-Advice.pdf



In-house Provision

- Across 2017/18 and 2018/19, one local authority funded in-house advice services only.
- One local authority ceased operation of its in-house advice service in July 2017.

Advice Reviews

- Fourteen local authorities are currently undergoing some form of review of advice services.
- Five local authorities reported that restructuring is currently taking place within their local authority – in some cases, this includes both in-house and external services, and in other cases, in-house services only.

Savings

- In 2017/18, four local authorities reduced their investment in advice services.
- Five local authorities confirmed that investment will decrease to some extent in 2018/19.
- One local authority said that further savings are likely.
- Two local authorities' savings proposals for advice services for 2018/19 were rejected.
- Two local authorities are proposing increases in investment in advice services for 2018/19.
- One local authority confirmed reduced investment in in-house advice services for 2019/20.



Background

Launched in 2015, with endorsement from Marco Biagi (former Minister for Local Government and Community Empowerment), the Framework for Public Funding of Advice² sets out key principles for the effective commissioning of advice services. By following the principles, developed in partnership with the Scottish Government and Scottish Legal Aid Board (SLAB), funders can be assured that they are operating in line with best practice in regard to the commissioning of both in-house and external advice services. In particular, the principles enable funders to develop joined-up commissioning approaches which result in the best outcomes for clients, provide good value for money, and minimise duplication of services across different providers.

The creation of the Framework for Public Funding of Advice was initially prompted by research³ undertaken by the Improvement Service in 2013. This research highlighted issues relating to the duplication and overlap of advice services, alongside gaps in service provision within particular areas. Concerns were also raised regarding a lack of focus on client outcomes, as well as limited monitoring of the quality of advice provided. As a major funder of advice services, local authorities have a key role to play in ensuring that these issues are addressed. The Framework for Public Funding of Advice seeks to support local authorities to implement the necessary changes to achieve this. In addition to reviewing commissioning approaches, this report also highlights some of the work that has been undertaken by local authorities in applying key elements of the framework.

This review of commissioning approaches being taken across Scottish local authorities is particularly apt as the Scottish Government conducts its own review of publicly-funded advice services. The review aims to guide a more coherent approach to Scottish Government funding of advice, which aligns appropriately with other public funders, including local authorities. As part of the review, the Scottish Government commissioned Blake Stevenson to carry out a desk-based research report, which outlines several recommendations relating to the need for further implementation of the Framework for Public Funding of Advice at both policy and operational levels.⁴

2 www.improvementservice.org.uk/documents/money_advice/Framework-for-Public-Funding-of-Advice.pdf

3 www.improvementservice.org.uk/documents/money_advice/money-advice-services-across-scotlands-local-authorities.pdf

4 www.gov.scot/Resource/0053/00531600.pdf



Methodology

For the purpose of this review, ‘advice’ is defined in accordance with the Scottish National Standards for Information and Advice Providers,⁵ which provides the following definitions for categories or types of assistance:

- Type I – Active Information, Sign-posting and Explanation
- Type II – Casework
- Type III – Advocacy, Representation and Mediation at Tribunal or Court Action Level

In particular, this review focuses on advice provided in relation to money, welfare rights and housing.

In July 2017, a survey was issued to all 32 Scottish local authorities, aiming to engage specifically with the officers responsible for commissioning advice services. The survey included questions relating to the decision-making structures and key local authority personnel for commissioning; current and future funding arrangements; the challenges faced in commissioning; and the use of the Framework for Public Funding of Advice. Additional follow-up engagement took place via a stakeholder event in October 2017, two webinars in March 2018, and one-to-one discussions.

This report outlines the findings from these engagements. These are subject to change as some local authorities are in the midst of procurement processes at the time of writing.

5 <https://beta.gov.scot/publications/scottish-national-standards-information-advice-providers-quality-assurance-framework-2009/>



Key Findings

Macro-level Factors Influencing Funding Decisions

Local authorities were asked to detail the major external factors which they expect will exert influence on future decision-making in regard to the commissioning of advice services.

Several legislative changes were cited. The Community Empowerment (Scotland) Act 2015⁶ provided Community Planning Partnerships (CPPs) with clear statutory focus in regard to improving outcomes and reducing inequalities, as well as requiring greater community involvement in decision-making. All of these requirements are expected to affect how advice services are commissioned. Additionally, as part of the Community Empowerment Act, CPPs must prepare and publish Local Outcomes Improvement Plans (LOIPs). Just over a third of local authorities mentioned that the priorities cited in LOIPs would influence future decisions on investment in advice services.

Concerns were raised in regard to the impact of the introduction of Social Security for Scotland⁷ on demand for advice, as well as actions being implemented through the Fairer Scotland Action Plan.⁸ Local authorities expect these changes to result in stronger links with the anti-poverty and financial inclusion agendas. Several local authorities also indicated that they have developed a greater focus on tackling child poverty. Further, an increase in referrals to advice agencies is expected due to the implementation of the Child Poverty (Scotland) Bill⁹ and Community Justice redesign.¹⁰

The budget-setting process is of major concern due to the continuous reductions applied to local authority budgets, with consequences for investment in the provision of advice. Some confusion exists across local authorities in regard to services which are statutory and non-statutory, particularly in regard to which category current investment in advice provision resides.

Concerns were also raised about the impact of Universal Credit (UC) on demand for, and subsequent performance of, advice services. This also extends to wider local authority functions, particularly due to the additional administrative costs incurring due to the introduction of UC. While positive changes have been introduced to tackle inefficiencies generated by UC, they have yet to take effect in terms of reducing the corporate debt that has been built up across local authority areas. As part of the roll-out of UC, local authorities expect a rise in homelessness, as well as greater demand on the Scottish Welfare Fund.

Commissioning Approaches in 2017/18, 2018/19 and Onwards

Decision-making

Responsibility for local authority investment in advice services tends to reside with senior

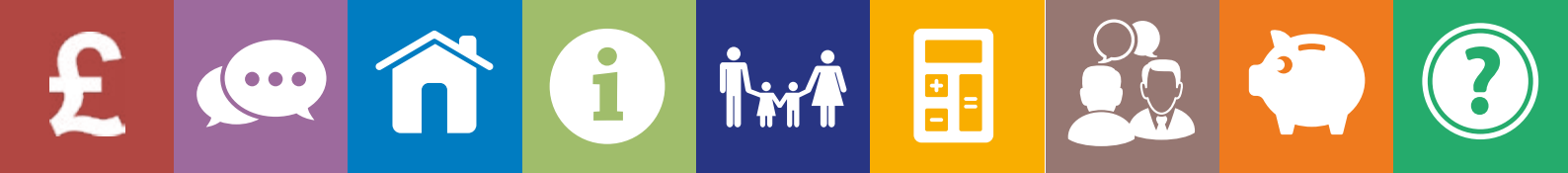
6 www.legislation.gov.uk/asp/2015/6/contents/enacted

7 www.gov.scot/Topics/Statistics/Browse/Social-Welfare/SocialSecurityforScotland

8 www.gov.scot/fairerscotland

9 www.parliament.scot/parliamentarybusiness/Bills/103404.aspx

10 www.gov.scot/Topics/Justice/policies/reducing-reoffending/community-justice



management, heads of service, tackling poverty and inequality officers, policy officers, and service managers. Decision-making structures are in place throughout a range of 15 different executive groups, varying by each local authority, with some holding greater powers of scrutiny than others. The decision-making process typically begins in November, with final decisions taken at full Council budget-setting meetings the following February or March.¹¹

The named officer responsible for the investment decision tends to also hold responsibility for monitoring the funded services, and only in few cases were they in a different role within the service area. In some cases, advice services are still funded from several different departments within a local authority. However, this is becoming less common.

Monitoring

In most cases, monitoring information tends to be submitted on a quarterly basis, followed by corresponding six-monthly meetings. Some local authorities also conduct annual reviews, and a few require advice services to regularly report on performance through a progress management system such as Covalent. The Improvement Service has recently published an in-depth Scotland-wide overview of these arrangements.¹²

Funding Arrangements

Local authorities were asked about the funding arrangements for advice services in 2017/18 and 2018/19.

In 2017/18, 25 local authorities funded advice services through grant-funded agreements, 4 via a formal contractual agreement, and 2 via a formal consortium contract. This is changing significantly in 2018/19, with 21 local authorities funding advice services through grant-funded agreements, 7 via a formal contractual agreement, and 2 via a formal consortium contract. One local authority is yet to confirm their new commissioning model. A comparison between the funding models used in 2017/18 and 2018/19 can be seen in Charts 1 and 2. It should be noted that one local authority moved from individual formal contractual agreements with eight separate providers in 2017/18 to one single contract and provider from 2018/19 onwards. Another local authority implemented a more robust grant-funding agreement and application process across six locality areas from 2018/19. A shift towards more strategic commissioning for advice services should also be highlighted, particularly in regard to the development of more outcomes-focused agreements. One local authority funds in house provision only.

¹¹ See Appendix One for breakdown of arrangements by local authority and Appendix Two for an overview.

¹² www.improvementservice.org.uk/documents/money_advice/MASQI-report.pdf

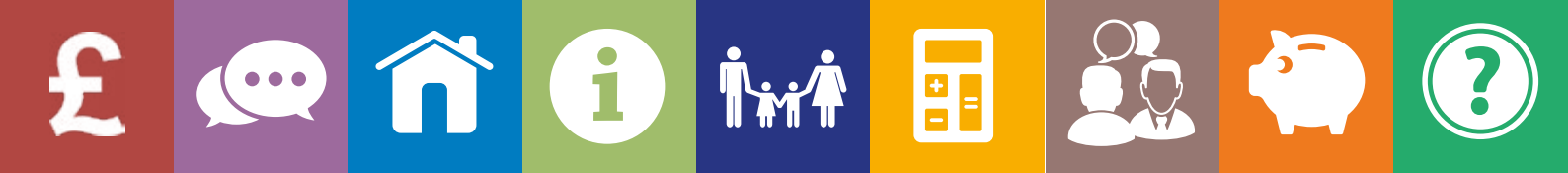


Chart 1: Funding Models in 2017/18

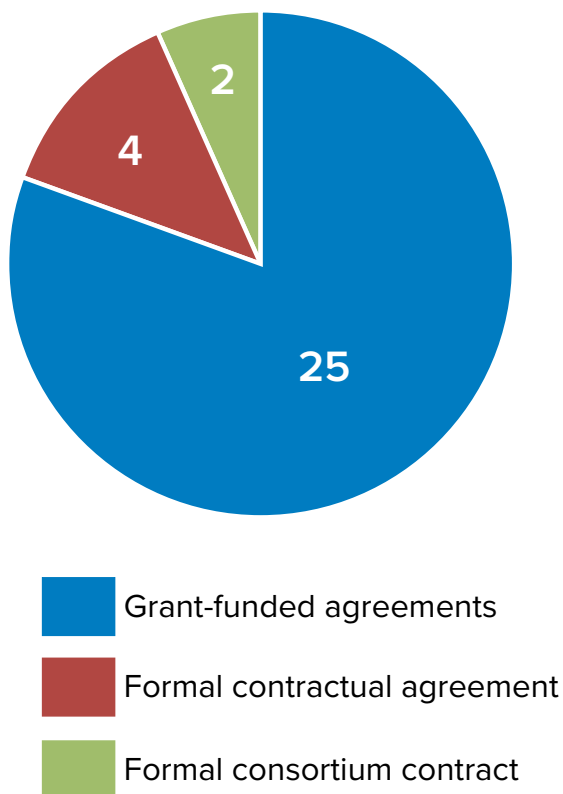
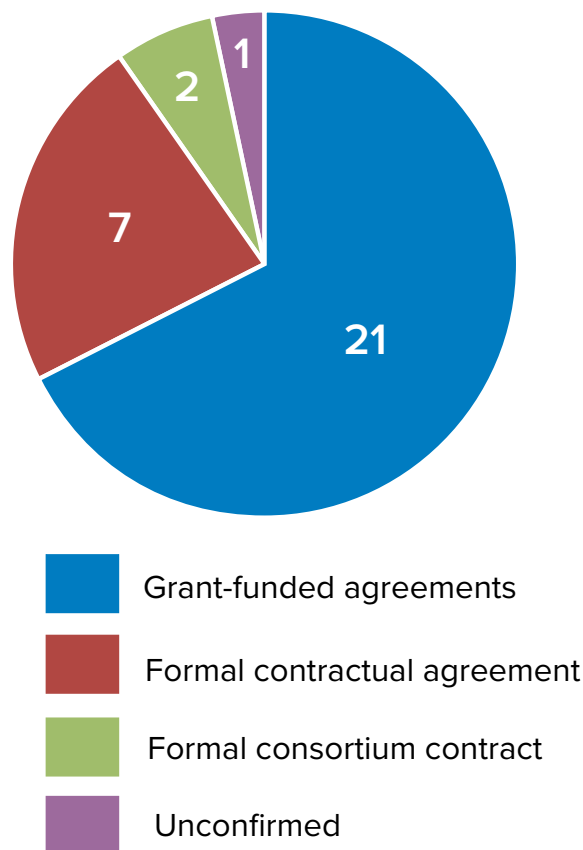


Chart 2: Funding Models in 2018/19



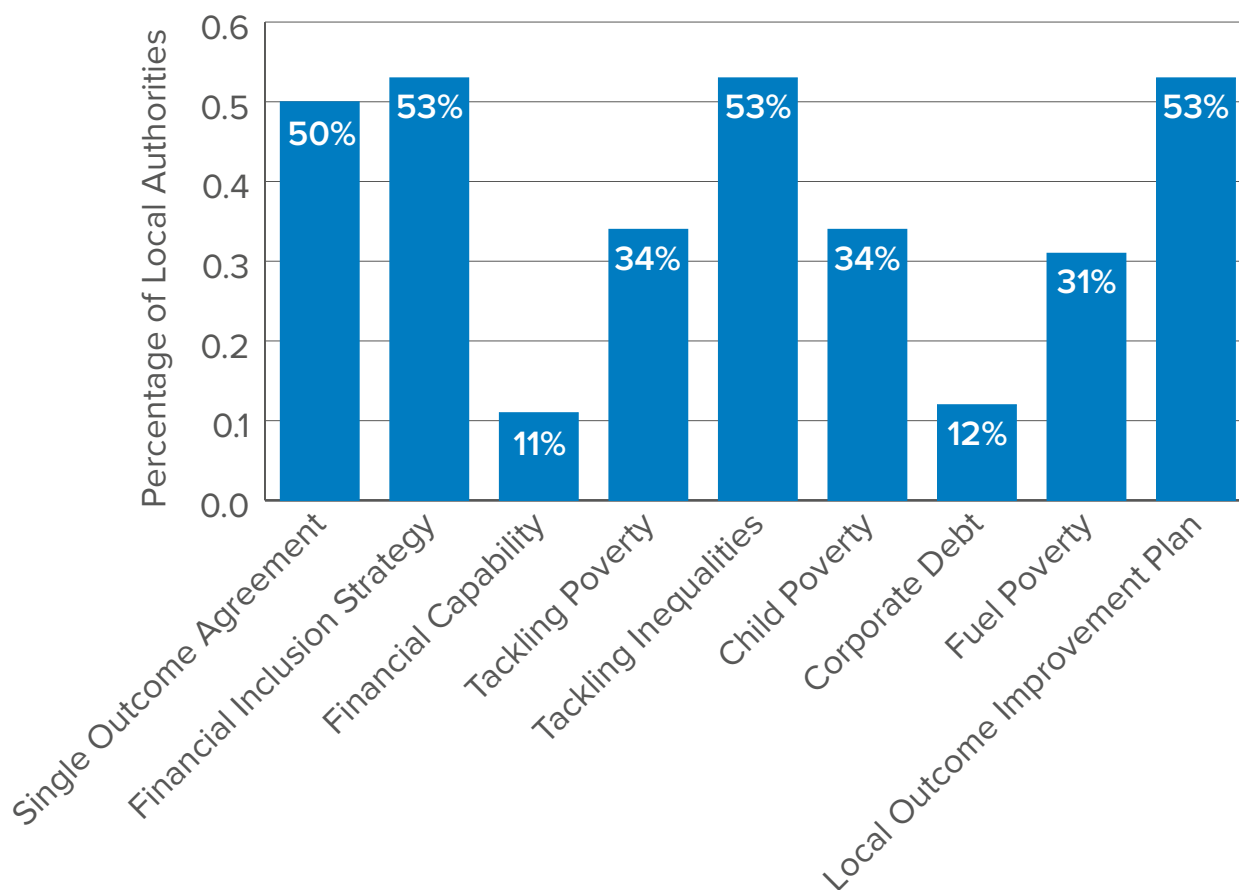
Despite the challenging climate of reducing budgets allocated to the provision of advice, a positive change can be seen in the number of local authorities that are now operating a more sustainable funding model. As of 2018/19, 17 local authorities have implemented longer-term funding arrangements – most commonly for 3-year periods. This change has been welcomed by advice services, as often they are left with insufficient time to plan exit strategies for staff once funding has ended.

Strategic Alignment of Current Funding

Local authorities were also asked about the alignment of current funding of advice services to any particular strategies or agendas. While the responses provided some information about this alignment, the findings outlined in Chart 3 may not wholly reflect the full picture across all local authorities due to varied engagement.



Chart 3: Strategic Alignment of Funding in 2017/18



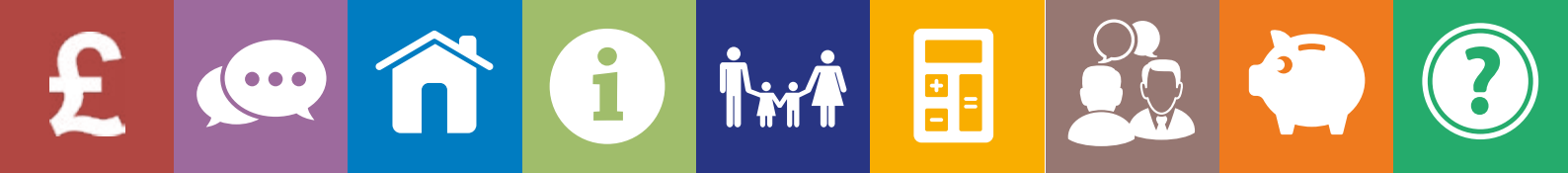
Other strategies referenced included promoting social inclusion, closing the attainment gap, and preventing homelessness.

Key Criteria used for Funding Decisions

Local authorities provided varying degrees of detail regarding the key criteria considered when making decisions related to investment in advice services. This is an area that will likely be subject to future development as service specification becomes more closely aligned with local authorities' strategic priorities, particularly as commissioning processes become more robust.

The key criteria cited by local authorities included:

- Reduction of poverty and targeting of service towards those from disadvantaged communities
- Demonstration of awareness of the links between income and health inequalities
- Evidence of demand from target groups
- Improving client employability



- Focus on facilitating earlier intervention
- Focus on achievement of outcomes, evidenced by appropriate performance management information
- Promotion of joint-working with relevant partners
- Investment in volunteers
- Focus on the provision of high quality advice

What is Being Considered in Future Funding Planning?

Local authorities were also asked about any future funding plans. Several said that they found making use of the MAPMF data useful, as well as client feedback, when deciding what services to fund, where to position such services, and how the services should be delivered. A number of local authorities stated that they are considering the implementation of alternative service delivery models, such as co-location within other public services and a focus on child poverty and targeting more support for families. Additionally, a few have indicated that they will be investing in some specific interventions aimed at increasing people's financial capability and financial education through the curriculum for excellence.

In the case of some local authorities, and often within the context of advice service reviews, project groups have been formed specifically to consider service redesign and transformation of funding models. As part of this, these groups are also considering how to apply the Framework for Public Funding of Advice.

Applying the Framework for Public Funding of Advice

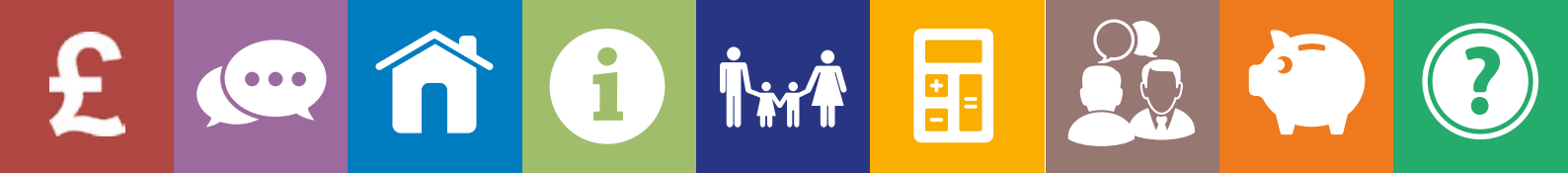
Local authorities were asked to detail the extent to which they have used the Framework for Public Funding of Advice, as well as areas in which they require additional support to embed its principles.

Some local authorities indicated that they are making progress towards embedding elements of the framework within their commissioning approaches. However, this is an area requiring further development and support to drive improvements. Examples of good practice in relation to the framework's use have been recorded and will be used to guide others in the application of the principles.

The framework has also been referred to by some of the local authorities who have completed, or are currently conducting, advice reviews. The full extent of these reviews, and how they will affect service delivery and funding, is not yet known in all cases.

Challenges and Solutions

Local authorities were asked to detail the challenges they face in the context of commissioning advice services, as well as share any solutions.



Local authorities highlighted difficulties in regard to allocating the resource required to review and implement procedures, including those relating to monitoring of the quality of advice provided, within the context of increasing pressure on advice services.¹³ Short-term funding models further exacerbate this challenge, with officers continuing to try to negotiate longer-term arrangements. In response to this, one example of positive partnership-working has emerged via the creation of funding sub-groups which assess the impact of funding streams coming to an end, with organisations working jointly to consider how to fill any resulting gaps in provision.

Establishing clear lines of accountability and agreement in relation to the performance management of advice services was also cited as difficult, particularly when taking an outcomes-based approach. This also extended to securing agreement on the technical systems used for recording and extracting information. Challenges associated with developing effective partnerships, such as agreeing priorities and protocols, were also raised.

Support needed

Responses to the survey and further engagement with local authorities has highlighted that additional support to embed the Framework for Public Funding of Advice via workshops and webinars would be welcomed. Local authority officers stated that they would like to learn more about the framework and would be interested in training and national networking opportunities. Many were interested in sharing evidence and good practice between funders. Officers also requested specific support in regard to educating decision-makers on the importance of embedding the principles of the framework. Additional areas in which local authorities requested support relate to benchmarking, the evaluation of projects, and assistance with the development of quality standards.

It was also suggested that the Scottish Government, alongside national umbrella organisations, should consider how they can work together to support advice providers. This was particularly cited in relation to encouraging continuous improvement. Looking forward, local authorities also highlighted that they require support with the local delivery arrangements for the Scotland Social Security system.

¹³ www.improvementservice.org.uk/documents/money_advice/MAPMF/mapmf-annual-report-201617.pdf



Conclusion and Recommendations

This report has summarised the findings from the Improvement Service's (IS) review of the commissioning approaches adopted in regard to advice services across all 32 Scottish local authorities in 2017/18 and onwards. It forms part of a series of publications by the IS to track local authorities' progress towards embedding the principles of the Framework for Public Funding of Advice.

The IS continues to recommend that local authorities embed the principles of the framework within their commissioning approaches. Progress will continue to be reviewed by the IS, who will work closely with local authorities and other relevant organisations to develop additional guidance to support the implementation of the framework's principles.

The Scottish Government should consider the findings of this report, particularly within the context of its new powers relating to the commissioning of debt advice in Scotland. As key developmental partners and supporters of the framework, the Scottish Legal Aid Board (SLAB) should also consider the findings.



Appendix 1

Overview of Local Authority Commissioning Approach for Advice Services 17/18 and 18/19

Local Authority	Contact	Governance Structure	Funding Model 2017/18	Funding Model 2018/19	Advice Review	Funding period	Savings 17/18	Savings 18/19
Aberdeen	Frank McGhee	Commissioning Directorate (from April 18)	Grant funding and SLA	Tbc - new commissioning service	n/k – pending new commissioning board Service transformation	Tbc	No	Budget 06.03.18 No
Aberdeenshire	Annette Johnstone	Communities Committee	Grant funding and SLA	Grant funding and SLA	Yes – outcome to be implemented April 19	Mar 19	No	No
Angus	Kim Banks	Finance Directorate	Grant funding and SLA	Grant funding and SLA	Yes – new structure from April 18	Mar 19	N/K	Yes of 5 FTE internal staff 38% reduction
Argyll & Bute	Alan Morrison	Policy and Resources Committee	Grant funding and SLA	Grant funding and SLA	Yes – consultant was appointed	Mar 19	No	Yes
City of Edinburgh	Mark Upward	Safer and Stronger Communities. Health and Social Care (Integrated Joint Board)	Grant funding and SLA	Grant funding and SLA - tender from Oct 18	Yes	Moving to 3-year model Oct 21	N/K	25% saving
Clackmannanshire	Ahsan Khan	Full Council Committee	Grant funding and SLA	New contract and tender May 18	N/K	1 year with a view to moving to 3 years	In house service ceased July 2017	N/K

Local Authority	Contact	Governance Structure	Funding Model 2017/18	Funding Model 2018/19	Advice Review	Funding period	Savings 17/18	Savings 18/19
Dumfries & Galloway	Wendy Jesson	Communities Committee then Leadership meetings	Grant funding and SLA	Grant funding and SLA - Moving to contract and tender from 1 Oct 18	Yes	Oct 21 3 years	No	Yes 3% reduction from advice and information budget = £35k and 30% from housing and advice budget = £45k or prisin outreach work from 01.10.18
Dundee	Derek Miller	Policy and Resources Committee	Grant funding and SLA	Grant funding and SLA	No	1 year	No	No
East Ayrshire	John Dalton	Grants Committee for external funding. Integrated Joint Board for Internal funding	Grant funding and SLA	Grant funding and SLA	Yes – internal team structure	Mar 21	No	N/K (proposal put forward for investment
East Dunbartonshire	Kirsty Anderson	Place Neighbourhood and Corporate Assets	Grant funding and SLA	Grant funding and SLA	No	N/K	No	N/K

Local Authority	Contact	Governance Structure	Funding Model 2017/18	Funding Model 2018/19	Advice Review	Funding period	Savings 17/18	Savings 18/19
East Lothian	Paolo Vestri Kenny Christie	Council Cabinet	Contract – consortium agreement	Contract – consortium agreement – to be reviewed Dec 18	Yes	Dec 18 3 year?	No	No
East Renfrewshire	Sharon Beattie	Council Cabinet	Grant funding and SLA	Grant funding and SLA	No	Mar 20 2 year	No	£30k in house 19/20
Falkirk	Sally Buchanan lyke Ikegwuonu	Poverty and Inequality Scrutiny Committee	Grant funding and SLA	Grant funding and SLA	No	Mar 20 3 year	No	No
Glasgow	Carolyn Armstrong	Wellbeing, Empowerment Community Citizen Engagement City Policy Committee of the Council	Grant funding and SLA	Grant funding and SLA	Reviewing grants programme	Mar 19		
Highland	Sheila McKandie	People Committee	Individual Contracts – 8 providers	Contract and tender single provider	No	Mar 20 3 year	Yes £120k	No
Inverclyde	Andrina Hunter	Policy and Resources Committee	Grant funding and SLA	Grant funding and SLA (looking at tendering)	Yes	Mar 18	No	Yes £250k savings
Midlothian	Alasdair Mathers	Full Council	Grant funding and SLA	Grant funding and SLA (may be subject to tender)	Yes	Apr 19 3 years	No	No

Local Authority	Contact	Governance Structure	Funding Model 2017/18	Funding Model 2018/19	Advice Review	Funding period	Savings 17/18	Savings 18/19
Moray	Peter Adamson	Full Council for external funding	Grant funding and SLA	Grant funding and SLA	No	Mar 19	No	No
North Ayrshire	David Dowland	Council Cabinet	Grant funding and SLA	Contract and tender	No	Mar 22 2 years +1+1	N/K	N/K
North Lanarkshire	John Campbell	Infrastructure Committee	Grant funding and SLA	Grant funding and SLA New model April 18	Yes	Mar 21 3 years	Yes	No Savings rejected
Orkney	Lesley Rendall	Policy and Resources	Grant funding and SLA	Grant funding and SLA	No	Mar 19	1% increase	No
Perth & Kinross	Eileen McMullan	Full Council	Grant funding and SLA	Grant funding and SLA	Yes	Mar 19 recurring	No	No
Renfrewshire	Dianne Dunn	Leadership Board/Finance, Resources and Customer Service Policy Board for the contract award	Grant funding and SLA	Tender and contract from July 18	No	3 years July 21	No	The new legal contract reduced by £5k and the general advice service by £4k to include Advice Renfrewshire helpline
Scottish Borders	Les Grant	Full Council Meeting	Contract and tender consortium multiple providers	Contract and tender consortium multiple providers	Yes	n/k	Yes 1 internal benefits post deleted	No

Local Authority	Contact	Governance Structure	Funding Model 2017/18	Funding Model 2018/19	Advice Review	Funding period	Savings 17/18	Savings 18/19
Shetland	Emma Perring	Development Committee	Contract and tender	Contract and tender	No	31 Dec 18	No	No
South Ayrshire	Gillian Farrell	Leadership panel	In house only	N/A	Restructure Review at leadership panel Dec 18	Leadership panel Dec 18	N/K	N/K
South Lanarkshire	John McCafferty	Finance and Corporate Resources Committee Community and Enterprise Resources Committee	Grant funding no SLA	Grant funding no SLA	On hold	31 Mar 19 1 year	No	Savings rejected
Stirling	Lesley Gallagher	CPP and Regeneration Committee	Contract and tender single agreement	Contract and tender single provider	Yes	Mar 19	No	No
West Dunbartonshire	Grant funding and SLA	Community Planning Partnership Structures	Grant funding and SLA	SLA agreement 1 Cab and 1 Independent	No	April 21 3 year	No	No
Western Isles	Colm Fraser	Communities and Housing Committee	Contract and tender single agreement	SLA, Govt, Contract and tender single provider	No	Mar 19	No	No
West Lothian	Elaine Nisbet	Full Council	Grant funding and SLA	Various	No Subject to internal merging services	Mar 19 1 year	No	Yes Savings for in house service £660k over 5 years



Appendix 2

Governance structures



Aberdeen City



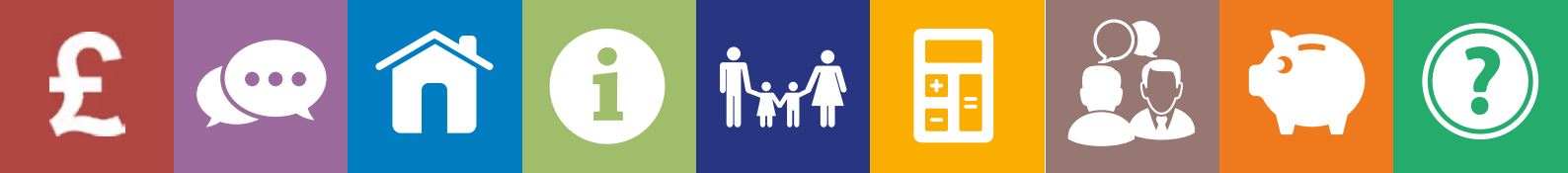
Contact	Frank McGhee (wef April 18)
Decision-making Committee	Commissioning Directorate (wef April 18)
Funding Model	<p>Grant funding agreement through Common Good Fund for Aberdeen CAB - SLA in place</p> <p>Grant Funding through Fairer Aberdeen Fund – Aberdeen CAB – SLA in place</p> <p>Commissioned Services from General Fund – Housing Advice - Shelter</p>
Funding Duration	<p>Funding for external advice through Aberdeen Citizens Advice Bureau is granted annually but this may change under new service design.</p> <p>Fairer Aberdeen Funding stream three-year agreement</p> <p>Housing Advice contract started with Shelter 2017 for three-year agreement with two years add on</p>
Funding Decision-making Timetable	February
Monitoring Arrangements	<p>New arrangements will be brought in under new Commissioning Directorate.</p> <p>The monitoring currently sits with various people across different service areas.</p>
Advice Service Under Review	Yes – subject to whole council transformation programme

Comments and 2018/19 and Beyond

Aberdeen City Council is leading a period of change in the city and as an organisation will be transforming. www.helpshapeaberdeen.com

The target operating model aims to create a customer-focused structure and a series of digital platforms that will change the way the organisation currently works.

It will introduce an outcome-based commissioning approach to service delivery in order to ensure best value for the public pound and to improve on the outcomes for customers.



The council will soon welcome four directors to lead the organisation through a new senior management structure based on four key functions: **customer, commissioning, operations and resources**. There will also be two additional functions: **place and governance**.

The decision-making structures for advice services in 2017/18 will now be disestablished as this change starts to take shape. The decisions around funding and commissioning for internal and external advice services will now come under the new Commissioning Directorate. Decisions will also go through the business intelligence to make sure that the decisions meet the aims of the Community Planning Outcomes and the [Local Outcome Improvement Plan](#) (LOIP).

The internal Financial Inclusion Team will come under the Customer Services Directorate and be overseen by Derek McGowan, Chief Officer, Early Intervention and Community Empowerment, Customer Directorate.

In 2017/18 funding for advice services cut across three different teams so this strategic approach to commissioning for the whole council should result in a more coordinated and joined up approach.

The approved budget from the Common Good Fund for Aberdeen CAB 2018/19 has seen a slight increase in 'core' funding and a reduced amount for the Money Advice Service.

www.aberdeencity.gov.uk/services/benefits-and-advice/get-money-advice



Contact	Annette Johnstone, Tackling Poverty and Inequality Manager
Decision-making Committee	Communities Committee
Funding Model	Grant funding agreement with service level agreement (multiple external providers).
Funding Duration	Budgets are set for 3 years with an annual review
Funding Decision-making Timetable	November
Monitoring Arrangements	<p>Monitored through the Tackling Poverty and Inequalities Strategic Group.</p> <p>Monitoring forms are completed and returned to the Tackling Poverty and Inequalities coordinator every three months to ensure the services delivered are good quality, accessible and relevant to people living across Aberdeenshire.</p> <p>Face to face monitoring meetings happen every six months to discuss quality, clients feedback, areas of improvement and challenges.</p> <p>Progress reports are presented to the Community Planning Board and the Communities Committee annually.</p>
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

Funding is in place until March 2019. Outcome of the review will be implemented in April 2019.

Council budgets are being refocused which may have an impact on future funding however, funding decisions will be based on outcomes and the needs of the clients.

The funding will be used to deliver the appropriate services to those that need them most.

There is no indication that the investment for information and advice services will be reduced however, how and where funding will be allocated is under review.



The Framework for Public Funding of Advice has been considered and will be used as part of the future assessment process. The council is exploring funding models including the possibility of using a tendering process for the commissioning of the advice and information services.

The review is in the early stages and will ensure the services will meet future requirements both externally and internally.

A research project has been carried out regarding child poverty and the findings from that will be considered going forward.

www.aberdeenshire.gov.uk/media/5916/adviceagencies_003.pdf



Angus



Contact	Kim Banks, Welfare Rights Manager
Decision-making Committee	Finance Directorate
Funding Model	Grant agreement with SLA (external provider)
Funding Duration	1 year
Funding Decision-making Timetable	October
Monitoring Arrangements	Face to face meetings happen six monthly and monitoring returns submitted quarterly to the council's contracts team. The contracts team are responsible for drawing up the grant agreement and forwarding to the Financial Inclusion Team Leader for approval.
Advice Service Under Review	Yes
Comments and 2018/19 and Beyond <p>The service review is not complete. The council internal financial inclusion team will have a new structure in place from April 18. This team has reduced in size with staff exiting the service through early retirement, voluntary severance and unfilled posts not being replaced.</p> <p>There is a net reduction in 2018/19 of five FTE staff in the new structure and a proposed saving of 32% from April 18.</p> <p>The council financial inclusion team operates a generic workforce with staff trained to deliver a generic welfare benefit and money advice.</p> <p>There is no saving to be made from the external grant funding agreement in 2018/19 to the Cab.</p> <p>Both the funder and provider will meet in next few months to review the current SLA and consider any proposals for change and feed back to the Head of Finance and future council committee.</p> <p>www.angus.gov.uk/benefits_and_money_advice</p>	



Argyll & Bute



Contact	Alan Morrison, Regulatory Services Manager
Decision-making Committee	Policy and Resources Committees
Funding Model	Grant funding agreement and SLA (multiple providers)
Funding Duration	Current grant agreement expires 31 March 18 and will extend one year to 31 March 19
Funding Decision-making Timetable	February
Monitoring Arrangements	The provider provides reports and the Regulatory Services Manager provides briefings to the policy directorate. The council is looking at how it can improve the quality of the current monitoring arrangements and is currently holding monthly face to face meetings to identify more closely what the constraints are on the contract and ways to support and improve.
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

The council commissioned an external consultant to carry out an independent review of advice and information services in 2017/18. It wanted to look across the whole council at how it could support the advice agencies both internally and externally and the consultant's review report was taken to the council Welfare Reform Working Group who developed the multi-agency action plan which is now being implemented over 18-month period. The group is chaired by Judy Orr, Head of Customer and Support Services.

Alan Morrison, Regulatory Services Manager reports to the Welfare Reform Group.

There will be no savings made to the 2018/19 budget for advice and information services but the council has been instructed to carry out a scoping exercise to look at three areas, to identify savings targets for 19/20 and 20/21.

1. To review all services – including debt, money advice, welfare rights, homelessness and all advice across the council and how it could be delivered better.
2. To consider how the council funds advice agencies in the future
3. Explore how to extend the credit union facilities across the council area for high risk groups and improve access to affordable credit



The scoping exercise will go to the policy and resources committee to determine how best to fund services in the future 2019/20 and 2020/21

The key principles of the Framework for Public Funding of Advice will be considered in this process going forward.

The council provides grant funding for the core management costs and administration costs support for advice services including general advice covering debt, money, benefits and housing.

The [Argyll and Bute Advice Network](#) provides a confidential electronic means for advice agencies and partners to refer clients to the best agency able to offer client centred services

[Money Skills Argyll](#) is funded by the Big Lottery Fund and the European Social Fund through the Delivering Financial Inclusion programme. Argyll and Bute Council and key partners have been awarded the £3.75 million contract to deliver a range of financial inclusion services in the area for a three-year period to 2020.

www.argyll-bute.gov.uk/money



Contact	Mark Upward, Advice Service Manager
Decision-making Committee	Safer and Stronger Communities Health and Social Care (Integrated Joint Board)
Funding Model	Grant agreement and SLA (external providers)
Funding Duration	Annual with a view to moving to 3-year model
Funding Decision-making Timetable	January
Monitoring Arrangements	Current monitoring arrangements involve providers agreeing performance targets at the start of year then providing quarterly reports on performance. Meetings take place quarterly to discuss monitoring reports and to identify patterns and trends in service delivery.
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

The Advice Review is ongoing and aims to have a new model for advice services in place by October 2018. The review of advice services is seeking to benchmark against other local authorities' arrangements.

The Framework for Public Funding of Advice has been considered during the council's review of advice process although full outcomes not yet known about how this will be embedded.

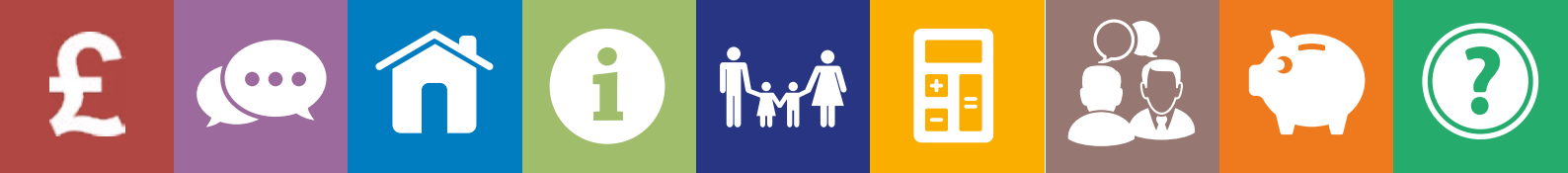
The review is covering advice funded by the Safer and Stronger Communities department and does not include funding provided by other departments, including the Integration Joint Board.

There is a savings target of 25% for this review and an aim to align services with the new localities that are now in place for Edinburgh (the city now has four localities and services are to be provided to meet the specific needs of each locality).

Grant funding for existing Safe and Stronger Communities agencies has been extended to 30 September 2018.

Grant funding for other services has been extended to 31 March 2019 (except for one provider who has a funding arrangement until 31.3.20).

During this time, the council may go through a tendering process for a start date in October 2018.



Nicky Brown, Homelessness and Housing Support Senior Manager is leading the review.

[Locality Improvement Plans](#)

www.edinburgh.gov.uk/info/20127/benefits_and_grants/851/help_to_manage_your_debts



Clackmannanshire



**Clackmannanshire
Council**

www.clacksweb.org.uk

Contact	Ahsan Khan, Head of Housing and Community Safety
Decision-making Committee	Full Council committee
Funding Model	Contract
Funding Duration	One year initially with a view to extending to 3 years
Funding Decision-making Timetable	October with ultimate decisions February
Monitoring Arrangements	Quarterly meetings and returns to Wilson Lees, Team Leader
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

A budget proposal paper had been put to the full council meeting in May 2017 and decision was taken to cease council internal advice service provision with effect from July 2017.

After the decision was made at council to cease the service, staff members were notified in May 2017 of the decision and offered enhanced severance settlement or redeployment. There were no compulsory redundancy situations.

There was an extension to the grant agreement and exemption of SLA report which was submitted to committee for approval. The tendering process will commence in May 18.

The council is going through a whole restructure and the review will look at people, place and performance and it is likely that any poverty related matters will sit under the service area for 'people'.

www.clacks.gov.uk/council/sourcesofhelp/



Dumfries & Galloway



Contact	Wendy Jesson, Anti-Poverty Officer
Decision-making Committee	Communities Committee for discussion and decisions on the review of current money advice contract Full council leadership meetings for final decisions
Funding Model	Grant funding agreement with SLA (external provider)
Funding Duration	Agreed to move to 3-year funding model
Funding Decision-making Timetable	February
Monitoring Arrangements	<p>The provider supplies monthly information at the beginning of each month on the range of each of the services that the council funds and how they are being delivered.</p> <p>The monitoring officer checks the results and adds the figures to the council monitoring system “Covalent”.</p> <p>Regular meetings have taken place between funder and provider to discuss the review of advice, the decision-making process and rationale for change and what the new monitoring arrangements would look like.</p> <p>Monthly updates and quarterly update reports.</p>
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

The council's [budget report](#) confirmed that there will be a reduction in commissioned advice and information services of 3%, equating to a £35k reduction, from 1 October 2018.

The current advice and information service with Dumfries and Galloway Citizens Advice Bureau (DAGCAS) is due to end 31 March 2018.

The current main commission includes the provision of money advice services, promoting financial capability, maximising household income, advocacy services, and advice on housing, employment, consumer, relationship or related issues.

The council is moving to a new commissioning model for future delivery of advice services. It is hoping to enter a tendering process in April 2018.



It was agreed at the Communities Committee on 5 December 2017 the current housing support budget for advice and information services and prison outreach, delivered by DAGCAS, would also be included in the new main advice and information service. However, this would also reduce by 30%, equating to £45,600.

The recommissioning will also consider the increased range of advice and support that is now available from a variety of other external and internal providers.

In the meantime, the council has extended a temporary contract to the existing provider (DAGCAS) for six months from 1 April 18 to allow time for the commissioning tendering process to complete with a new contract award with effect from 1 October 18.

The council formed a project group at the end of 2017 specifically for purpose of this review. The group has now met twice and will be covering every aspect of both internal and external services and how they can be delivered.

This group has representatives across the council services including legal, strategic housing, revenues and benefits, homeless strategy, anti-poverty and procurement team.

A letter was sent out to the current provider to notify them of the decision following the council committee meeting in January 18 along with confirmation of grant funding extension.

www.dumgal.gov.uk/article/15927/Benefit-advice



Dundee



Contact	Derek Miller, Financial Inclusion Development Officer
Decision-making Committee	Policy and Resources Committee
Funding Model	Grant agreement and SLA (external providers)
Funding Duration	1 year (April 18)
Funding Decision-making Timetable	December
Monitoring Arrangements	<p>The Dundee Partnership reviews existing funding agreements with agencies concerned. Data is submitted to Dundee Partnership on a quarterly basis.</p> <p>The agency submits bids and outlines of proposed services and targets for each funding round.</p> <p>Bids are scored by a multi-disciplinary team against SOA/LOIP priorities.</p> <p>Recommendations on funding agreements are then submitted for approval to the council's Policy and Resources Committee.</p>
Advice Service Under Review	No

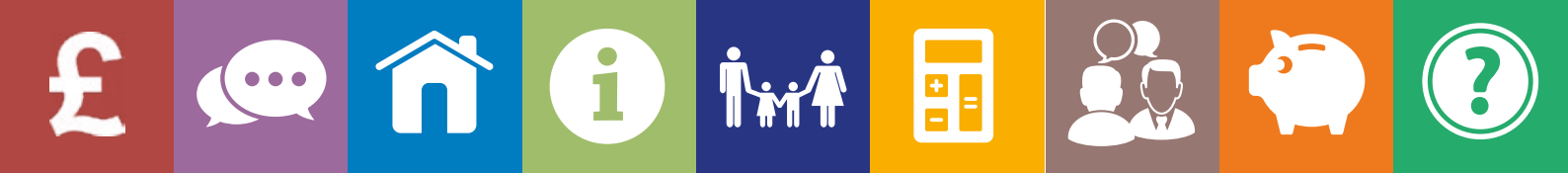
Comments and 2018/19 and Beyond

The Framework for Public Funding of Advice has been used in Dundee when considering service planning and commissioning of Advice Services.

There were no savings made in 17/18 and no savings planned for 18/19 but the challenge of not knowing how Scottish Government cuts may impact make it difficult to forecast ahead for the Local Authority.

The [City Plan 2017–2020](#) for Dundee is the first Local Outcomes Improvement Plan (LOIP). Future budgets are influenced by the LOIP priorities.

The [Dundee Partnership](#) and Scottish Government are now jointly funding a new project to follow on from the Fairness Commission. The group will involve an equal number of people who have personal experience of poverty working alongside senior civic, political and business leaders in Dundee. Over a period of 18 months they will develop a shared understanding between the two groups of commissioners and make proposals around key areas of anti-poverty work identified through their experience and knowledge. The process will be facilitated by Faith in Community Dundee, in partnership with Dundee City Council and the Social Justice and Regeneration Division



of the Scottish Government.

The Fairness Commission's 56 recommendations were published in the report [A Fair Way to Go](#). These were endorsed in full by the Dundee Partnership and a Fairness Action Plan was agreed in November 2016 framed around Stigma and Social Inclusion, Work and Wages, Reducing the Education Gap, Benefits, Advice and Support, Housing and Communities (including fuel and food poverty); and Improving Health.

The Council has contractual arrangements in place with partners providing a service under the [European Social Fund Programme through Big Lottery](#). Although there is no plan now to change the way the Council funds money benefit and debt advice services this £3m project may act as a test of change which could see how advice services are organised and funded in Dundee change if the model we are testing is successful.

[Meeting of Policy and Resources Committee 2 February 2018](#)

www.dundee.gov.uk/veterans/money-matters-benefits-welfare-advice-and-debt



East Ayrshire



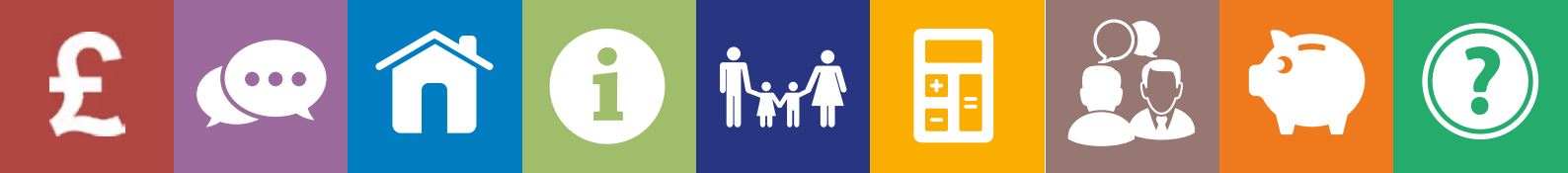
Contact	Gwen Barker – lead officer for facilitating the grants committee
Decision-making Committee	Grants committee for external funding Integrated Joint Board – for internal funding
Funding Model	Grant funding agreement and SLA
Funding Duration	Three-year funding for external services came to an end in 2016/17 and was extended for a further one year subject to this further review. Proposals have been made for a longer-term funding period three-year agreement with annual reviews. Grants committee decision meeting 15 March 2018 (no savings proposed)
Funding Decision-making Timetable	November
Monitoring Arrangements	John Dalton, Financial Inclusion Development Manager is the Monitoring Officer for the external funding to Citizens Advice Bureau and internal Financial Inclusion Team. Quarterly face to face monitoring meetings take place with the Cab Manager who talks through the update report. The monitoring officer then passes the information to the grants committee for the elected members to access, discuss and arrange payments. The Cab submits the invoice. A report is submitted to the Integrated Joint Board (IJB) for the internal Financial Inclusion Team.
Advice Service Under Review	Yes –internal team only (no savings proposals expected)

Comments and 2018/19 and Beyond

External

This is the first time that a proposal has been made for longer-term funding.

The monitoring officer and Cab manager held discussions regarding the future funding and



sustainability and the possibility of attracting funding from additional resources, reflecting on the challenges ahead with Universal Credit. There is a willingness to an annual review and a commitment to adopt a long-term funding strategy.

Internal

The Financial Inclusion Manager has carried out an internal review for the restructuring of the inhouse team to identify how best to deliver services going forward. Proposals were put forward to (IJB) for restructuring.

The Financial Inclusion team in East Ayrshire support people in poverty to access benefit entitlements. The team has recently appointed a dedicated Financial Inclusion Officer with a lead role on Child Poverty issues. The team is working with The Poverty Alliance to further address poverty issues and food bank dependency during 2017. This team provide the triage service through the East Ayrshire Money telephone helpline and web portal.

The proposal was made for further investment of resources to go in to the service at the same time about a model that can create efficiencies whilst working in line with the Health and Social Care Partnership Transformation Strategy.

The review is currently being carried out and due to complete by end of April 2018 to allow staff members an opportunity to comment on the proposals. A report will be taken to the (IJB) committee meeting after April 18.

www.eamoney.co.uk



East Dunbartonshire



sustainable thriving achieving

East Dunbartonshire Council

www.eastdunbarton.gov.uk

Contact

Kirsty Anderson, Policy Officer, Community Planning and Partnerships

Decision-making Committee

Place Neighbourhood and Corporate Assets

Funding Model

Grant funding agreement with SLA

Funding Duration

1-year funding ends 31 March 2018

Funding Decision-making Timetable

May

Monitoring Arrangements

The monitoring officer carries out face to face meetings and funding agreements and six-monthly reports to committee

Advice Service Under Review

No - funding for 18/19 still tbc

Comments and 2018/19 and Beyond

Advice Service agreement with the Citizens Advice Bureau will be aligned with financial inclusion priorities and the [Local Outcomes Improvement Plan](#) (LOIP).

Each of the outcomes will require identified inputs and activities that will be considered and agreed with the service provider prior to the start of the contract. These jointly agreed actions will form the basis to monitor progression towards the successful delivery of the stated outcomes, throughout the course of the funding period.

In addition to the evidence required, the CPP will require a full financial breakdown detailing how the total funding is being spent at six monthly intervals.

www.eastdunbarton.gov.uk



East Lothian



Contact

Paolo Vestri, Corporate Policy and Improvement Service Manager

Kenny Christie, Revenues and Welfare Support Service Manager

Decision-making Committee

Cabinet

Funding Model

Contract consortium agreement multiple providers

Funding Duration

3-year ending December 18

Funding Decision-making Timetable

December

Monitoring Arrangements

The contract is reviewed twice a year and both contacts attend council meetings.

Advice Service Under Review

Yes – as contract progresses towards the end of funding period

Comments and 2018/19 and Beyond

The contract for advice services was procured through a tendering process. The decision to award the contract was devolved to officers - Head of Communities and Partnerships. It was reported to members through a Members Library report.

“The consortium members include: Haddington CAB, Musselburgh CAB and Carers of East Lothian. The consortium arrangements include, welfare advice (income maximisation), money advice, housing advice and general advice. Changeworks provides energy advice through a separate contract.

The council also has a welfare rights team providing welfare advice to the highest level.” (SNSIAP)

The council is now reviewing the current model.

Kenny Christie, Revenues & Welfare Support Service Manager became responsible for the Council’s welfare benefit services in January 2017.

East Lothian was the first Local Authority in Scotland to roll out full service of [Universal Credit](#) (UC). A recent survey shows the negative impact this is having on people in East Lothian.

In 2018/19, the council plans to use DWP funding for UC personal budgeting support to help establish in-house capacity to carry out this work, following a two-year period during which the provision was outsourced.

New council webpages for advice services go live April 18



East Renfrewshire



Contact	Sharon Beattie, Head of HR, Customer and Communications
Decision-making Committee	East Renfrewshire Council Cabinet
Funding Model	Grant funding agreement with SLA
Funding Duration	2 years
Funding Decision-making Timetable	March
Monitoring Arrangements	Meetings are ad hoc between the council and Cab and will move to six-monthly meetings and have data comparison meetings. Monitoring meetings are carried out by Sarah Jane Hayes, Operations Manager
Advice Service Under Review	No

Comments and 2018/19 and Beyond

The council funds external services through the Citizens Advice Bureau through the council's Strategic Grants Fund and Housing and Environment departmental budgets.

The council funds internal services through an integrated money advice and rights service.

There will be a £30k funding reduction from the council internal money advice and rights team in 2019/20. This was some of the additional funding put in place to support the transition to Universal Credit.

The Framework for Public Funding of Advice has applied to help avoiding duplication of services between the council MARS team and Cab and when exploring opportunity to join resources with other funders.

The focus of activity going forward recognises the priority of the proposed [Local Outcomes Improvement Plan](#) (LOIP) to reduce inequality in all its forms including financial inclusion, linked to the ageing demographic of the population and levels of unemployment.

In relation to the future funding of advice services there will be no increase to funding instead the focus needs to be on prioritising greatest areas of need within available resources.

The council seeks corporate customer satisfaction returns on an annual basis having recently moved from quarterly reviews.

[East Renfrewshire Council Financial Planning 2018-2024](#)

www.eastrenfrewshire.gov.uk/money



Falkirk



Contact

Sally Buchanan, Fairer Falkirk Manager
lyke Ikegwuonu, Corporate Policy Officer

Decision-making Committee

Poverty and Inequality, Scrutiny Committee

Funding Model

Grant funding agreement

Funding Duration

3-year due to end 31 March 2020.

Funding Decision-making Timetable

February

Monitoring Arrangements

Corporate Policy Officer carries out quarterly monitoring with the three Cabx. There is a performance reporting plan for this purpose. Funds are released on a quarterly basis.

Advice Service Under Review

No

Comments and 2018/19 and Beyond

The aim of the funding is:

To provide a broad range of advice and signposting to the citizens of Falkirk, working in partnership with Falkirk Council and other advice agencies; embracing the 12 principles set out by Citizens Advice Scotland.

Within the context of the Poverty Strategy, to enhance the provision of advice relating to debt and income maximisation for areas and groups at risk of poverty in the Falkirk Council area.

[Local Outcome Improvement Plan](#) – strategic outcomes and priorities

[Towards a Fairer Falkirk](#) - Poverty Strategy which aims to reduce poverty and its impact on individuals and communities in Falkirk area.

www.falkirk.gov.uk/services/benefits-support/money-advice.aspx



Fife



Contact	Laura MacKean, Policy Officer
Decision-making Committee	Community and Housing Committee
Funding Model	Grant funding agreement with SLA (external provider)
Funding Duration	3-year funding agreement wef April 18 (subject to approval Community & Housing Services Committee meeting 29 March 2018)
Funding Decision-making Timetable	March
Monitoring Arrangements	Fife Council has a monitoring and evaluation framework in operation across all organisations it funds. This is monitored and evaluated by the community investment team.
Advice Service Under Review	No

Comments and 2018/19 and Beyond

Fife Council funds external Advice Services through Citizens Advice Rights Fife (CARF).

The Fife Advice Partnership brings together key agencies in Fife to provide an integrated approach across advice services.

The partnership is responsible for the strategic oversight and coordination of multi-agency advice to resolve issues of complex debt, housing, homelessness and mitigate aspects of welfare reform for people. The steering group meets quarterly to discuss the strategic priorities and future direction.

Fife Council helped established a new group made up of public and third sector organisations with the intention of looking at how best to use the key principles of the [Framework of Public Funding of Advice](#) and consider how best to implement it as a good practice.

Fife Rights Forum are reviewing the guidance and the quality and monitoring frameworks currently used and evaluation. The current model comprises of a corporate approach to monitoring for the whole council and third sector

Fife Community Planning and – [Local Outcome Improvement Plan](#)

[Working Towards a Fairer Fife](#)

www.fifedirect.org.uk/topics/index.cfm?fuseaction=subject.display&subjectid=974B6487-69C2-4FA5-B9F4-6BF8DEB0F709



Glasgow



Contact	Lesley Haddow, Financial Inclusion Manager
Decision-making Committee	Wellbeing, Empowerment Community and Citizen Engagement City Policy Committee of the Council
Funding Model	Grant funding agreement and SLA (multiple external providers)
Funding Duration	Mar 19
Funding Decision-making Timetable	February
Monitoring Arrangements	<p>Strategic oversight and management of the delivery of funded services is a function of the Financial Inclusion team within Financial Services who carry out performance monitoring. All external agencies submit quarterly monitoring reports which are collated into a city-wide report.</p> <p>Agencies' performance is reviewed every 3 years, where it is also benchmarked against each other, in line with the commissioning process</p> <p>Funding recommendations for external services are made as part of the Integrated Grant Fund allocations. This is the responsibility of the Grants & Initiatives Team within Democratic Services in the Chief Executive's Department who carry out financial and organisational monitoring</p>
Advice Service Under Review	No

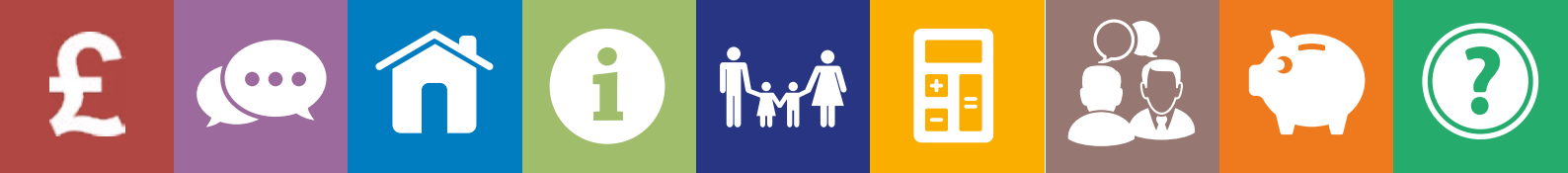
Comments and 2018/19 and Beyond

Integrated Grant Fund

The council will agree its Budget for 2018/19 including an overall IGF allocation by 31 March 2018.

A detailed report on IGF with specific grant recommendations will be submitted to the council's City Administration Committee and Glasgow Community Planning Partnership by 18 May 2018.

Funding recommendations and management for the Internal Welfare Rights Team sit with the HSCP with decision making at the Integration Joint Board



IGF grant awards for external services are normally confirmed by committee in January or February each year. Internal funding decisions are taken around the same time.

External financial inclusion agencies overall are funded to deliver services covering welfare benefits, money advice, financial capability, housing advice, employment law advice, social welfare law advice.

As part of its grant agreement, each of the 17 agencies has its own profile of indicators against these topics with some restricted to specialist areas and some being more generic.

The council's strategic plan 2017-22 for Glasgow outlines a number of strategic priorities that the city government intends to take forward over the next few years. This includes carrying out a review of IGF in 2018/19 with the intention that a reformed grant programme will be operational from April 2019. This review will consider:

- New criteria for accessing funding
- How to widen access to the fund to include previously excluded groups
- How the council can be a fairer funder – examining how we can fund projects for longer than a year and how we facilitate reporting on spending
- Other issues raised by the sector

www.gain4u.org.uk



Highland



Contact	Sheila McKandie, Benefits and Welfare Manager
Decision-making Committee	People Committee
Funding Model	Contract single provider 1 April 18
Funding Duration	3 years with option of + 2 (1+1)
Funding Decision-making Timetable	October
Monitoring Arrangements	Monitoring officer – new performance framework to be introduced April 18
Advice Service Under Review	No

Comments and 2018/19 and Beyond

Click the link to read the committee report relating to the [Review of Debt and Advice and Related Services](#)

You can view the [webcast](#) of the People Committee and Highland Council advice review and all other relevant [papers](#).

The Highland Council advice and information services were previously provided via eight contracts with each of the Citizens Advice Bureaus.

Inverness Citizens Advice Bureau will now have the single contract to provide the advice and information contract across Highland from 1 April 2018.

www.highland.gov.uk/info/335/community_advice/405/welfare_support



Contact	Andrina Hunter, Service Manager Inequalities, Migration and Strategic Housing
Decision-making Committee	Inverclyde Council Policy and Resources Committee
Funding Model	Grant funding agreement with SLA
Funding Duration	There is no recurring budget for external commissioning of advice services. Funding has been allocated through a Welfare Reform Mitigation Fund for 2016-18.
Funding Decision-making Timetable	February
Monitoring Arrangements	tbc
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

- Proposals for Advice Services are developed by the Financial Inclusion Partnership
- The Welfare Reform Project Board discuss proposals.
- Decisions and Governance is through Inverclyde Council Policy and Resources Committee

Most of Advice Services are funded in house as core Council funding. This is currently subject to savings proposals potentially up to £250k.

£12k of the budget has been set aside to externally commission a review of all advice services in Inverclyde.

The savings proposal prompted the review as some of the wider partners and providers within the Financial Inclusion Partnership also reporting that they have lost or are likely to have their funding reduced from other funders eg Big Lottery etc.

This review will include a whole Council approach to advice so it's more than money and debt advice.

- The Financial Inclusion Strategy will be refreshed and there will be a community engagement event to encourage input

The key principles of the Framework for Public Funding of Advice will be considered in the new commissioning approach going forward.

www.inverclyde.gov.uk/health-and-social-care/information-advice/advice-services/money-advice



Midlothian



Contact	Alasdair Mathers, Community Planning Manager
Decision-making Committee	Council
Funding Model	Grant funding agreement with SLA (external providers)
Funding Duration	3-year funding extended to April 2019
Funding Decision-making Timetable	December
Monitoring Arrangements	Link officer, six monthly performance reporting on Covalent system
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

An external consultancy review has just been completed which undertook a range of interviews and horizon scanning / evidence gathering pieces of work before making recommendations for getting best value from the resource available focussing on commissioning services to specific outcomes more tightly and internally on revising the focus of work of staff in council who deal only with referred clients toward greatest income maximisation.

Split of resourcing/ service focus – External provider (Cab) provide money advice, and walk in universal access advice/assistance,

Internal council team takes on complex case, appeals, tribunals and internal referrals from social work adult and child services, housing and revenues.

[Midlothian Financial Inclusion Network](#) (MFIN) network is used as part of the CPP to ensure no overlap or duplication and strategic fit with the [Local Outcome Improvement Plan](#) (LOIP).

Within the annual CPP planning cycle, data is collated on Midlothian which includes evidence of demand and of future pressures through a strategic assessment using a PESTEL analysis tool.

There is a welfare reform strategy group of council and partners which has been developing shared change management approaches, and attracting funding for support to targeted members of the community affected by welfare reform. Currently this is focussed on Universal Credit full service roll out.

The thrust of recommendations from the advice review are being consider at council in March with a proposed internal restructuring of services towards a “one stop shop” model and proposed move from grant aiding to commissioning CAB services.

[Financial Inclusion Strategy 2016-2019](#)

www.midlothian.gov.uk/info/612/benefits_and_grants



Moray



Contact

Peter Adamson Trading Standards Manager

Decision-making Committee

Full Council Committee

External funding is decided by full council as part of annual budget setting process.

Internal funding is included in the overall budget setting process.

Funding Model

Grant funding agreement with SLA (external provider)

Funding Duration

1 year

Funding Decision-making Timetable

February

Monitoring Arrangements

Quarterly monitoring against an SLA by the Trading Standards Manager. Quarterly face to face review meetings looking at the output against targets.

Advice Service Under Review

No

Comments and 2018/19 and Beyond

External funding of CAB - covers advice on wide range of subject matter.

www.moray.gov.uk/moray_standard/page_1571.html



North Ayrshire



North Ayrshire Council
Comhairle Siorrachd Àir a Tuath

Contact	David Rowland, Head of Service
Decision-making Committee	Council Cabinet
Funding Model	Health and social care have recently decided to go to a formal tender process for funds which were previously allocated through SLAs.
Funding Duration	2 years with 2 x 1-year extensions
Funding Decision-making Timetable	March
Monitoring Arrangements	Under review
Advice Service Under Review	As below

Comments and 2018/19 and Beyond

Health and Social Care directly (H&SC) deliver Money Matters welfare rights and debt advice service, which is a financial inclusion service targeted on health and social care customers. H&SC have also historically procured advice services. H&SC report to the Integration Joint Board and where appropriate Council Cabinet.

Economy and Communities are leading on the lottery/ESF funded Better Off programme and as such have entered into a sub-contracting agreement with six local providers. Progress of this programme is reported six-monthly to Cabinet and more regularly to funders. Lead Officer - Greig Robson

Meeting of the Council 20 Dec 2017

At the Cabinet meeting on 29 August 2017, and subsequently ratified at IJB held on 14 September 2017, it was agreed to significantly change the way in which public advice services were provided across North Ayrshire. The decision was to promote the welfare advice services by the North Ayrshire partnership and to put a range of other advice services out to competitive tender.

No savings have been made to the advice service budget for 17/18 and 19/19 but a decision had to be taken to reallocate how some of it could be used.

Alignment of Advice Services

Tender - North Ayrshire council invites bids to provide welfare, debt advice and general advice to members of the public across the North Ayrshire area.

This tender failed and a full review of all advice services across North Ayrshire will now be carried out in 18/19 to help inform the future need and commissioning of advice services 19/20.



The funding allocated to the tender has been temporarily reallocated to the Money Matters service in the Health and Social Care Partnership



North Lanarkshire



Contact

John Campbell, Financial Inclusion Manager

Decision-making Committee

Policy and Resources Committee approves the outcome of the review

Infrastructure Committee approve funding

Funding Model

Grant funding agreement with SLA (multiple external providers)

Funding Duration

3 Year model with effect from 1 April 2018

Funding Decision-making Timetable

November

Monitoring Arrangements

Senior link officers in Financial Inclusion team will carry out the monitoring role.

Each Locality Area will have its own SLA and there will be quarterly monitoring returns.

Advice Service Under Review

Yes tbc

Comments and 2018/19 and Beyond

The review of advice services has been completed. Elected members have noted at the budget meeting 2018 that although no savings are due for 2018/19 that there should still be another review details of which are not yet known.

The principles of the Framework for Public Funding of Advice have been considered in this process.

The council internal welfare rights and money advice teams have gone through a restructure and the teams now merged and come under the financial inclusion service.

www.northlanarkshire.gov.uk/index.aspx?articleid=23499



Orkney



Contact	Leslie Rendall
Decision-making Committee	Policy & Resources
Funding Model	Grant funding agreement with SLA (single provider)
Funding Duration	1 year
Funding Decision-making Timetable	November
Monitoring Arrangements	As per SLA
Advice Service Under Review	No

Comments and 2018/19 and Beyond

Funding decisions based on budget setting process for each financial year as determined by elected members. recent years have seen most third sector organisations being protected from any reduction in funding - which has therefore maintained steady funding for money advice with annual increases.

Information and Advice Strategy

For 2017/18 the core funding increased by 1% and there was no change to the current model for advice. The SLA covers money advice, but as the Cab also provide Universal Credit Assisted Digital Support and Personal Budgeting Support these aspects are also covered in the SLA.

www.orkney.gov.uk/Council/C/advice-and-information.htm



Perth and Kinross



Contact	Eileen McMullan, Service Manager
Decision-making Committee	Council
Funding Model	Grant funding agreement with service level agreement (single provider)
Funding Duration	Recurring (decided annually)
Funding Decision-making Timetable	February 2018
Monitoring Arrangements	Under review -ongoing discussions
Advice Service Under Review	Yes – ongoing discussions

Comments and 2018/19 and Beyond

Funding decisions are made through the council's budget setting process and are subject to an internal scrutiny process via a Commissioned Services Board within the relevant department

All externally commissioned services have been subject to a strategic review.

Ongoing discussions are taking place between the council and provider (Cab) to sort out internal payment mechanisms and amalgamate funding streams into the main budget.

The funder and provider have been working together to try to find some sustainable solutions.

The council is committed to continuing to fund the Cab particularly in relation to the wider impacts of Universal Credit.

A meeting is being set up by the council to look at the outcomes measurement as part of wider specification of the agreement.

The contract management process is under review.

The council is in the process of recruiting someone to come in to the contracts management role.

There will be new contract monitoring meetings and reports required quarterly. The frequency of meetings will depend on the level of risk and strengths of boards, staff etc. This work has yet to be concluded.

www.pkc.gov.uk/article/14600/Money-matters



Contact	Diane Dunn, Policy Officer
Decision-making Committee	Leadership Board /Finance, Resources and Customer Service Policy Board for the contract award.
Funding Model	Tender and contract (from July 18)
Funding Duration	3 years
Funding Decision-making Timetable	
Monitoring Arrangements	The Policy Officer is the monitoring officer and will carry out face-to-face monitoring on a quarterly basis and receive monitoring returns quarterly
Advice Service Under Review	Going through procurement process - decision to award both lots to Renfrewshire Citizens Advice was agreed at FRCSP Board in March 18. Statutory procurement process being followed at present.

Comments and 2018/19 and Beyond

External Services - Advice Services - [tender \(2 x Lots\)](#)

General Advice and Advice Renfrewshire Website/Phoneline

The advice service will include, but not be restricted to money/debt, financial capability, welfare benefits, housing and employment. Advice Renfrewshire is a 'single front door' to advice in Renfrewshire, and consists of a website and free 'phoneline'.

Community Based Legal Advice

Requirement is to provide the free legal service to those living in Renfrewshire. The service is funded to support those most in need – those living in poverty, disabled people and those who simply cannot afford to pay a solicitor to act on their behalf.

The legal service will provide mainly advice with regards to housing, homelessness, employment, debt, public law, community care and disability and welfare rights.

It is anticipated that the successful contractors would become part of the Advice Partnership in Renfrewshire, and work to ensure clients are directed to the most relevant source of advice for them



Scottish Borders



Contact	Les Grant, Customer Services Manager
Decision-making Committee	Central Management Team (CMT) – Full council meeting
Funding Model	Contract and tender agreement - consortium arrangement with multiple providers
Funding Duration	Yearly (April 18)
Funding Decision-making Timetable	October
Monitoring Arrangements	Paid quarterly to CAB. Funding agreed as per contract.
Advice Service Under Review	No

Comments and 2018/19 and Beyond

Scottish Borders Council currently has a contract with Borders Citizen Advice Consortium (BCAC). The consortium consists of the three Borders CABx; Roxburgh & Berwickshire, Central Borders, and Peebles & District.

Representatives from the consortium meet with the lead officers from SBC on a quarterly basis to review performance/statistics and any key issues around the contract. In addition, operational liaison meetings are held with the Bureau Managers, Financial Support and Inclusion Team Leader, Homelessness and Financial Support Manager and Customer Services Representative on a two-monthly basis.

There has been a re-designing of the council customer services along with homelessness and welfare benefits. The new service went live from the 1 November 2017

www.scotborders.gov.uk/info/20075/help_applying_for_benefits/301/how_can_the_financial_support_and_inclusion_team_help



Shetland



Shetland
Islands
Council

Contact	Emma Perring, Policy Officer
Decision-making Committee	Development Committee
Funding Model	Contract and tender agreement - single provider
Funding Duration	Ends 31 December 2018
Funding Decision-making Timetable	February
Monitoring Arrangements	Quarterly monitoring meetings take place. Next contract will be tendered in summer 2018 Monitoring arrangements.
Advice Service Under Review	No
Comments and 2018/19 and Beyond	
Joint funding agreement with Shetland Charitable Trust.	
www.shetland.gov.uk/Welfare_Reform_Employability/MoneyAdviceandBudgeting.asp	



South Ayrshire



Contact

Gillian Farrell, Co-ordinator– Organisational Development and Customer Services

Decision-making Committee

Leadership panel

Funding Model

Internal provision only (following a restructure and review of funded advice services)

Funding Duration

Funding Decision-making Timetable

October

Monitoring Arrangements

Advice Service Under Review

Leadership panel has requested an update report by the end of 2018 to chart the progress of embedding the new structure for Advice Services following the outcomes of the review.

Comments and 2018/19 and Beyond

The leadership panel of the council called for a review and redesign of advice services involving all internal and externally funded money advice and welfare benefits services.

This review and redesign was led by Customer Services and has now concluded. It has resulted in the merging of staff from (an externally funded resource centre and two internal service areas).

An Advice Hub was created in early 2017 as part of the whole service redesign. Following this restructure staff gained new job descriptions and the shift has been made to a multi-skilled generic workforce. Training for staff has become a priority and a commitment has been made for going through the accreditation process for the Scottish National Standards for Information and Advice Providers.

Reports on the outcomes from the review and the progress of embedding the new structure get reported to the leadership panel. The next formal update will go to the leadership panel by the end of 2018 unless there is a pressing need to highlight any concerns in the interim.

Full Universal Credit implementation started in February 18 and ongoing analysis of customer trends and data will inform future service delivery, including outreach locations, going forward.

Housing advice is funded separately within the council.

www.south-ayrshire.gov.uk/information-and-advice-hub/



South Lanarkshire



Contact	John McCafferty, Senior Development Advisor
Decision-making Committee	Finance & Corporate Resources Community & Enterprise Resources Committee
Funding Model	Grant funding agreement no service level agreement. (multiple providers)
Funding Duration	1-year funding agreements
Funding Decision-making Timetable	February
Monitoring Arrangements	John McCafferty is responsible for the overall monitoring of the voluntary sector grants. David Reid, Planning and Economic Development is the direct monitoring officer for Cabx based on an annual countersigned Grant Agreement. Part of this process is an annual review in February and a formal six-monthly review in October.
Advice Service Under Review	Review is on hold following discussions with the new administration/leadership and the Corporate Management Team.

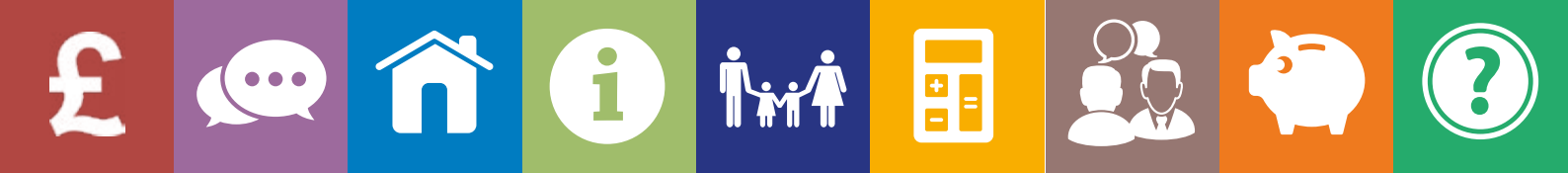
Comments and 2018/19 and Beyond

Funding for the Cabx comes from Finance & Corporate Resources. Gordon Bow, Administration Manager is responsible for this funding.

The Cabx also receive Tackling Poverty Funding and Economic Development funding to deliver specific money advice support to areas in the worst 15% SIMD or designated communities if the 15% does not apply. This funding is also awarded annually and is routed through the Community and Enterprise Resources Committee John McCafferty, Senior Development Advisor, Planning and Economic Development Services. Community and Enterprise Resources is responsible for this funding.

The Cabx must demonstrate that they are meeting the key priorities of the council including Tackling Poverty and Inequality and Financial Inclusion.

The Framework for Public Funding of Advice had been employed by the council in its review of advice services. A Corporate Voluntary Sector Review Group had been set up as part of this process and had started to consider savings. Savings proposals had been put forward for 2018/19 but this has now been disregarded.



The review has now been put on hold and this decision was made at the Community Planning Manager and Corporate Executive Group.

The recent council [budget](#) meeting agreed a third sector funding Increase of 3%

The council funded internal services have been reviewed on more than one occasion in recent years and implemented some structural changes on the teams to help create efficiencies. This includes change to service delivery models across the four locality areas. The service needs to demonstrate they are meeting the corporate and strategic priorities and meeting and fitting in with the [Local Outcomes Improvement Plan](#) (LOIP)

www.southlanarkshire.gov.uk/info/200134/benefits_and_money_advice



Contact	Lesley Gallagher, Senior Manager – Economic Development & Regeneration
Decision-making Committee	CPP and Regeneration Committee
Funding Model	Tender and contract
Funding Duration	extended 1 year until 31 March 2019
Funding Decision-making Timetable	
Monitoring Arrangements	<p>Quarterly monitoring reports and KPIs are submitted from the provider and these are reported to community planning and regeneration committee.</p> <p>Monitoring meetings are carried out by the Tackling Poverty and Inequality Officer.</p>
Advice Service Under Review	Yes

Comments and 2018/19 and Beyond

External

The Cab contract was due to come to an end 31 March 2019 but the council agreed to extend the Cab for a further 12-month period. As part of council's budgetary process there was a proposal put forward to look at services again to make sure that they were being delivered in a positive way to meet the needs of service users and the council felt it was important to give stability to the Cab to locate in libraries and in community spaces.

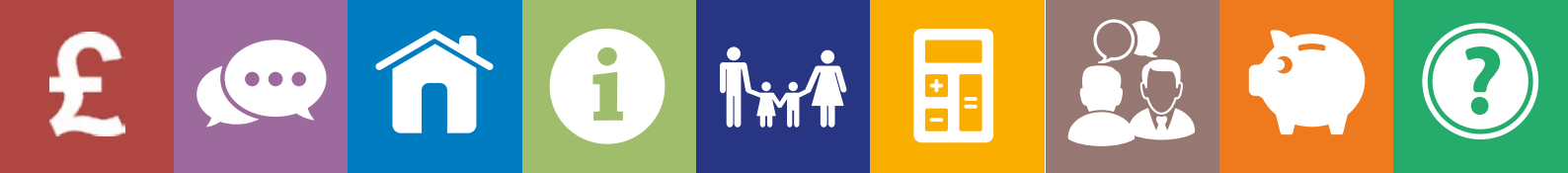
The council has now reviewed this and letters have been issued to the providers.

Internally

The in-house advice service has a mix of externally funded posts through Shelter, NHS and MacMillan. The Cab is funded to provide generalist advice and any requests for specialist support as defined within the [SNSIAP](#) can be referred on to the internal advice team.

A review of Council funded advice

Universal Credit (UC) is placing huge demand on the advice team and third sector colleagues. The council also funds income maximisation officers in housing services and social work. The council is now looking to carry out a review of its funded services and will incorporate wider council services and work with colleagues in the project management office. The scoping work has already been done and it should now take four months for internal work done and a further 4–8 weeks to understand the relationship with third sector. It should take six months to complete.



Short Life Working Group

Elected members were keen to establish a short life working group on UC. It would be about how to ensure the work that the council can do to mitigate against welfare reform and services. This group has cross party support and the council hopes to have some useful learning from this to share with the IS and COSLA.

The group will start to look at where council policy may penalise people. There will be a total policy scan across the council to make sure no one is inadvertently disadvantaged. This will also include staff and they will work with HR and look at the data sharing with council and DWP. Digital literacy and digital inclusion will feature as part of this work using the budget allocated under the allocated growth monies to look at UC and mitigation. This work is being led by the Advice Team and Revenues and Benefits.

The Council also funds the third sector organisation [Council on Disability](#) to provide generalist benefits advice.

The Advice Service is part of the economic development and regeneration service and that presents cross opportunities across the employability team who will be dealing with the new [Fair Start Scotland](#) for Forth Valley, libraries and outreach work, alcohol and drugs partnership and sport as change.

It will be about making sure that the priorities are strategically aligned with the [Local Outcomes Improvement Plan](#) (LOIP).

<https://my.stirling.gov.uk/services/community-life-and-leisure/community-advice/advice/services>

[Better Off Stirling](#)



West Dunbartonshire



Contact

Stephen Brooks, Working4U Manager

Decision-making Committee

Community Planning Partnership structures including the Delivery and Improvement Group Employability and Economic Growth.

Funding Model

Grant funding agreement with service level agreement (multiple providers)

Funding Duration

3 years wef April 18

Funding Decision-making Timetable

November

Monitoring Arrangements

Working4U Coordinator and Compliance Team Leader have responsibility for monitoring.

Performance indicators are recorded on the Council Progress Management System (Covalent).

Advice Service Under Review

No

Comments and 2018/19 and Beyond

Recent committee decisions resulted in the funding agreements for the two external providers Cab and the Independent Resource Centre continued for a 3-year period.

www.west-dunbarton.gov.uk/jobs-and-training/working4u/what-is-working4u/



Western Isles



Comhairle nan Eilean Siar

Contact	Colm Fraser
Decision-making Committee	Communities and Housing Committee
Funding Model	Contract and tender agreement – (single provider)
Funding Duration	1 year
Funding Decision-making Timetable	December
Monitoring Arrangements	Monthly meetings with external provider (Cab) and attends occasional board meetings. Quarterly returns.
Advice Service Under Review	No
Comments and 2018/19 and Beyond	
<u>Tender published 24.11.18</u>	
<u>Contract 18/19</u>	
Current contract expires 31st March https://www.publiccontractsscotland.gov.uk/search/show/search_view.aspx?ID=FEB309340	



West Lothian



West Lothian
Council

Contact	Elaine Nisbet, Anti-Poverty & Welfare Advice Manager
Decision-making Committee	Full council
Funding Model	Mixed
Funding Duration	1 year
Funding Decision-making Timetable	February
Monitoring Arrangements	
Advice Service Under Review	No

Comments and 2018/19 and Beyond

There are procurement arrangements for some pieces of work depending on the nature and cost.

Some are funding processes which require funding bids and a process of agreeing the criteria, for others there are service level agreements.

The council funds both West Lothian Citizens Advice Bureau and West Lothian Financial Inclusion Network to provide advice. They will both continue to receive funding for 2017/18 however how they are funded will change next year in line with the decisions made at full council relating to the budget.

All funding arrangements have to be agreed by council.

The council in-house Advice Shop will be merging with the Benefits team to form a new Anti-Poverty service. It has still to be determined what else is in the scope of the new service. The anti-poverty refresh is on-going and a draft is due in April 18.

The combined team has to find savings over the five years of £660,000. The initial saving of £150,000 has to be made in year 19/20. The bulk of the saving will be made towards the end of the five-year budget strategy.

The new anti-poverty service will not include the council Revenues team. The council Revenues team fund money advice/welfare officers co-located within the Corporate Debt Recovery team.

The decision to create the new service was taken at full council. This has now been delegated to Donald Forrest, Head of Finance and Property Services to implement.

www.westlothian.gov.uk/advice-shop



Improvement Service

iHub

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W. www.improvementservice.org.uk

May 2018