# CAPMRF Research Survey

**1. Introduction**

**The Improvement Service is carrying out additional research to supplement the findings of this years Common Advice Performance Management Reporting Framework (CAPMRF). This research has three main aims;
To provide a more detailed understanding of the support provided by local authority funded money and welfare rights advice services and what this achieves.
An understanding of how COVID-19 has impacted the work done by these services, including the impact on face to face service delivery.
An insight into how services are supporting clients with debt and preventing debt.
As with the CAPMRF the focus of this research is specifically on money and welfare rights advice. In this context money and welfare rights advice refers to free-to-client advice. Most free-to-client money advice providers describe the service they offer as money or debt advice with some elements of budgeting support, income maximisation, financial inclusion and financial education. Most free-to-client welfare rights advice providers offer assistance with questions regarding entitlement to benefits, benefit checks, help completing application forms, and advice on challenging unfair decisions.

This survey asks about other support offered to money and welfare rights advice clients. This is to recognise the shift in many services towards more holistic approaches to advice provision. In this context additional support refers to support typically offered to money and welfare rights advice clients as opposed to separate areas of advice provision.

The findings of this survey will be summarised in a research report which will be shared with colleagues prior to publication.**

**2. Contextual Information**

### **1. Please select the local authority your service operates in \***

|  |  |
| --- | --- |
|    | Aberdeen City |
|    | Aberdeenshire |
|    | Angus |
|    | Argyll & Bute |
|    | Clackmannanshire |
|    | City of Edinburgh |
|    | Dundee City |
|    | Dumfries & Galloway |
|    | East Ayrshire |
|    | East Dunbartonshire |
|    | East Lothian |
|    | East Renfrewshire |
|    | Eilean Siar |
|    | Fife |
|    | Falkirk |
|    | Glasgow City |
|    | Highland |
|    | Inverclyde |
|    | Midlothian |
|    | Moray |
|    | North Ayrshire |
|    | North Lanarkshire |
|    | Orkney Islands |
|    | Perth & Kinross |
|    | Renfrewshire |
|    | Scottish Borders |
|    | Shetland Islands |
|    | Stirling |
|    | South Ayrshire |
|    | South Lanarkshire |
|    | West Dunbartonshire |
|    | West Lothian |

### **2. Please select the type of advice your service provides**

|  |  |
| --- | --- |
|    | Money Advice only |
|    | Welfare Rights Advice only |
|    | Both Money Advice & Welfare Rights Advice |

**3. Support Provided to Money Advice Clients**

### **3. Please select the activities generally included as standard practice when supporting a money advice client**

|  |  |
| --- | --- |
|    | Money or debt advice |
|    | Budgeting support |
|    | Income maximisation |
|    | Financial Education |
|    | Other (please specify):

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### **4. Please select which additional support your service routinely offers to money advice clients**

|  |  |
| --- | --- |
|    | Signposting/referrals to other services |
|    | Support with mental health issues |
|    | Financial skills training |
|    | Other forms of advice (e.g. housing, employment) |
|    | Activities linked to earlier intervention (please specify) |
|    | None of the above |
|    | Other (please specify):

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Any other comments

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### **5. When supporting money advice clients, what type of advice would you say is most often provided to clients?**

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| --- | --- |
|    | Type 1- Active information, sign-posting and explanation |
|    | Type 2- Casework |
|    | Type 3- Advocacy, representation and mediation at tribunal or court action level |

**4. Support Provided to Welfare Rights Advice Clients**

### **6. Please select the activities generally included as standard practice when supporting a welfare rights advice client**

|  |  |
| --- | --- |
|    | Benefit entitlement queries |
|    | Benefit checks |
|    | Support completing application forms |
|    | Advice on challenging unfair decisions |
|    | Court/tribunal representation |
|    | Other (please specify):

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Any other comments

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### **7. Please select which additional support your service routinely offers to welfare rights advice clients**

|  |  |
| --- | --- |
|    | Signposting / referrals to other services |
|    | Support with mental health issues |
|    | Financial skills training |
|    | Other forms of advice (e.g. housing, employment) |
|    | Activities linked to early intervention (please specify) |
|    | Other (please specify) |
|    | None of the above |

Any other comments

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### **8. When supporting welfare rights advice clients, what type of advice would you say is most often provided to clients?**

|  |  |
| --- | --- |
|    | Type 1 – Active information, sign-posting and explanation |
|    | Type 2 – Casework |
|    | Type 3 – Advocacy, representation, and mediation at tribunal or court action level |

**5. Non-financial gains/Additional benefits**

### **9. Money and Welfare Rights advice provision often achieves additional benefits for clients aside from financial gains. Please select which non-financial gains you would say are routinely achieved for money and welfare rights advice clients supported by your service.**

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| --- | --- |
|    | Client signposted/referred to additional support |
|    | Prevention of legal action |
|    | Tenancy/property retained |
|    | Other (please specify):

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Any other comments

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**6. Impact of Covid-19 on Service Delivery**

### **10. Previous research has shown, in some cases, a preference for face to face advice delivery. What has your service done to ensure people could still access support when this type of delivery method has not been available?**

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### **11. How has increased use of digital/telephone access to advice impacted on (1) advice workers and (2) service users? Do you have any evidence of this?**

|  | Advice workers | Service users |
| --- | --- | --- |
| Impact |

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| Evidence |

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### **12. Since the start of the COVID-19 outbreak has there been any change in the average length of time spent supporting an individual client?**

|  |  |
| --- | --- |
|    | Increased a lot |
|    | Increased a little |
|    | No Change |
|    | Reduced a little |
|    | Reduced a lot |

Any other comments

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### **13. What are the biggest long-term changes to service delivery that your service has experienced since the COVID-19 outbreak? Please describe both changes that have had a positive impact on service delivery and changes that have had a negative impact.**

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| Changes with a positive impact |

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| Changes with a negative impact |

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Any other comments

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### **14. Thinking about how COVID-19 may continue to impact money and welfare rights advice both in relation to demand and service delivery, what would you say are your biggest concerns and optimisms for the future?**

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| Concerns |

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| Optimisms |

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**7. Support for debt clients**

Previous research by the IS found that at the start of the pandemic, demand for debt advice had reduced, however, there was a concern this would surge once support measures were lifted, and debts grew.

### **15. Thinking about how debt advice in your service currently compares with debt advice prior to the COVID-19 outbreak, how has this changed? Examples may include change in; demand, debt type, number of debts, amount of debt, severity of debt, likelihood of agreeing and implementing formal debt solutions.**

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### **16. Has your service engaged in any new outreach activities aimed at promoting the service to people with debt?**

|  |  |
| --- | --- |
|    | Yes (please provide examples) |
|    | No |

Any other comments

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### **17. Does your service have any strategies aimed at debt prevention?**

|  |  |
| --- | --- |
|    | Yes (please provide examples) |
|    | No |

Any other comments

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**8. Future of Advice Services**

### **18. Has your service been redesigned following the COVID-19 outbreak?**

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| --- | --- |
|    | Yes, and this did include the views of people with lived experiences (please provide examples) |
|    | Yes, and this did not include the views of people with lived experiences |
|    | No |

Any other comments

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### **19. What capacity would you say your service has to test new approaches?**

|  |  |
| --- | --- |
|    | Sufficient capacity |
|    | Limited capacity |
|    | No capacity |

Any other comments

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### **20. If your service had the capacity to test new approaches, what have you already tested out / would like to test out?**

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### **21. Thinking about the future of your service, what would you say would make the biggest positive impact?**

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**9. Further Information**

### **The Improvement Service would like to conduct a small number of follow up interviews to discuss these questions in more detail. If you are interested in participating, please provide your contact details below. This is entirely optional and in leaving your details you agree that we can process your personal information according to the IS privacy policy. Contact details will be used solely for the purposes outlined above and stored securely for one year.**

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| Name |

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| Organisation |

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| Email Address |

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