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# Delivering advice together

## Learning from the Advice Plus experience

A report of a national survey of the Advice  
Plus Local Advice Networks (LANs)

Commissioned by Citizens Advice, Advice UK  
and the Law Centres Federation

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# Introduction

## Who is this report for and what is the background?

This report evaluates the Local Advice Networks (LANs) that were created by the Big Lottery Advice Plus funding stream. It has gathered information about how well the LANs were able to operate with the funding, and offers information for anyone thinking of joining, running, supporting, or funding a local advice network. A summary of the report has already been issued and can be found at: [www.citizensadvice.org.uk/index/aboutus/publications/advice\\_plus.htm](http://www.citizensadvice.org.uk/index/aboutus/publications/advice_plus.htm).

## Background and context to the Local Advice Network survey

The Big Lottery launched two funding streams to support the advice sector in 2006-9.

Advice Plus Round 1 (2006/7) was aimed at supporting frontline advice services, and organisations could bid independently of any partners. The application criteria were fairly open, resulting in significant oversubscription (1200+ applications and only 71 awards).

The outcomes specified in Round 1 were that: people have better access to advice services so that they can get the information, guidance and support they need; people who need advice get better services that help them overcome or avoid disadvantage and improve their lives; organisations that give advice and organisations that support them have more influence on relevant policy and practice; organisations that give advice get better support that helps them to work more effectively.

Three factors led to Round 2 (2008/9) having different and more precise criteria as well as specifying that the networks should be “legal” advice networks. These factors were:

- The significant oversubscription in Round 1
- A smaller budget of £20m
- A specific policy initiative from the Legal Services Commission that, in geographic areas where local authorities were willing to partner them, generalist and specialist advice budgets be combined and delivered through either Community Legal Advice Centres (one central location in a prescribed area) or Community Legal Advice Networks (several locations in a prescribed area). Advice providers had to bid for combined generalist/specialist contracts, which often necessitated the formation of partnerships.

Round 2 also included the requirement for minimum quality standards and sustainability and a focus on partnerships covering geographical areas roughly equivalent to the local authority and including all of the main advice providers in the area. It also specified that the network should provide a wide range of legal advice services including welfare benefits, debt, employment and housing.

The outcomes specified were that organisations work in partnership to achieve **all** of the following:

- People in greatest need have better access to legal advice services that help them to avoid or overcome disadvantage and improve their lives
- People in greatest need receive timely, accurate and effective legal advice that is quality assured and joined up with other services, so that they are better equipped to deal with their problems and improve their lives
- People in greatest need avoid disadvantage because commonly encountered legal problems are identified and prevented.

The lead agency had to bid with at least one other organisation as a partner. Round 2 funded 39 advice networks across England.

The advice sector also formed some informal regional networks consisting of representatives of the national advice sector organisations, such as Citizens Advice, Advice UK, Age UK (then Age Concern), the Law Centres Federation (LCF), and others such as Shelter, Race Equality networks etc. The regional networks made links between the local networks and work being carried out by the BLF-funded Working Together for Advice project which involved national advice networks.

Both the East Midlands and South West regional networks continued to meet into 2012 providing opportunities for sharing information, holding joint events and providing a voice for the advice sector. In the South West a number of meetings were held to support the local advice networks. As the funding for some of the Local Advice Networks in Round 2 was coming to an end in 2012, there was some discussion at their meeting in January 2102 about evaluation of the projects and their outcomes, as well as what lessons for the future could be learnt from the work to date - both for the LANs and for the national membership organisations.

At the suggestion of participants at the meeting, including the Advice Services Alliance, it was agreed that the Big Lottery and the national organisations be approached to see if a pan-England survey could be conducted to capture information from all the projects - or at least to see if resources could be saved by carrying out some common evaluation processes across all the networks.

Following discussion, the three national organisations, Citizens Advice, the Law Centres Federation and Advice UK agreed to jointly commission an independent consultant to carry out a survey in June 2012 of all Round 2 Advice Plus projects and Advice Plus Round 1 projects where an identifiable lead contact was still available.

## **About the survey and the report**

This report is a resource. It aims to record good practice, facilitate links between LANs, identify challenges commonly faced by LANs and make recommendations for future work involving LANs. It is not designed to evaluate any individual LAN.

The report is based on an analysis of 32 responses<sup>1</sup> from lead partners (that is those organisations that in almost all cases led the bid and received the grant) and 30 local partner or member organisations. It is assumed that respondents listed as partner organisation any formally named in the bid as a partner. Member organisations were additional organisations – a wider grouping encompassed by the LAN, participating to varying degrees in its development, and the delivery of or access to advice services. It offers learning to local advice networks, national infrastructure organisations and funders. The term LAN has been used through out as a generic term to refer to the networks set up with the BLF Advice Plus funds.

It was agreed by the three organisations (Citizens Advice, the Law Centres Federation and Advice UK) that an online survey would be the swiftest method of getting data from LAN leads and partners / members and it ran for three weeks in June 2012. The survey (in two parts, for leads and for partners/ network members) has generated quantitative and qualitative data that has been analysed to give some statistical data, coupled with insights into the issues raised.

This research has analysed extensive data to capture good practice, the lessons and the issues. The report has identified areas where more detailed work could be done.

LAN leads were contacted and invited to reply to their survey. The leads were asked to forward the members/partners survey. The responses have been treated in the analysis as if they come from the LAN lead, regardless of whether they were completed by co-ordinators working for independently established partnerships for example. The LANs are numbered, rather than named, because anonymity was promised.

## **The structure of the report**

There are four sections and a summary. Within the sections are the key questions that map the interests of LAN stakeholders, based on questions used in the survey. Some sections separate the views of the leads from the views of other members / partners, and are headed in that way. Sections end with key points about good practice, challenges and finally learning, recommendations and issues. These form the summary. Appendices complete the report.

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<sup>1</sup> One survey response was incomplete but was included. Leads baseline moves to 31 where no data from this LAN.

# 1. About the Local Advice Networks in this report

## Which LANs contributed?

Thirty-two Round 2 LAN leads provided considerable information about their activities and arrangements, coupled with a further 30 responses from “partner” and “member”<sup>2</sup> organisations from twelve LANs<sup>3</sup>. Three of these responses came from one LAN with no lead organisation response. They are included. Only one Round 1 LAN lead responded<sup>4</sup>.

The LANs represented a wide range of types of network and geographical locale from the south west to the north east of England. Cities, towns, counties, London boroughs and other combinations of areas are included. Lists of respondents are included in the appendices.

## What amounts of BLF Advice Plus funding did they receive?

Twenty-eight LANs received between £400-500k in total<sup>5</sup>. Four LANs received between £200 and £400K. One received under £100k and was an atypical small partnership in Round 1. Most ran between three and five years. The analysis has not focused on any significant patterns relating to amounts of funding but this could be investigated further.

## What additional funding did they access?

Sixteen (50 per cent) of the LANs reported that they obtained additional funding during the period of the BLF grant. Three LANs received Supporting Change Funds (BLF) and one mentioned Advice Service Funds (which came from central government, administered by BLF). Ten LANs (approximately one third) received other forms of funding. These included: substantial sums (over £50k) from foundations, local authorities, and regional bodies. Smaller sums were obtained from a local transition fund, Citizens Advice and a trust.

Sixteen (50 per cent) of the LANs did not access further funding. Two of these mentioned however that the LAN's existence had “generated various other paid projects to deliver which has extended hours / posts”, and another said that “the project has been important in providing evidence to support partner funding bids”.

## Did they have a network before the funding?

Twenty (more than 60 per cent) of the LANs reported some form of network before receiving Advice Plus funding. A few of these were described as very informal or loose. One project reported that their existing network was expanded with the funding. Another said that the “loose network” which existed before was “not as effective”. In one city the bureaux had been in a consortium and also most of the “agencies had worked together on an informal basis”.

## How many and what kind of mix of organisations were in the networks?

The table in Appendix four shows the extreme variety in LAN size. Numbers of partners vary from two to 113. Organisations in the LAN described as “members” also varied widely.

The survey did not ask for a definition of ‘partner’ or ‘member’. Partners were formally involved in governance (sometimes delegating to a smaller steering or core group). Some LANs included member organisations that participated to varying degrees in its development, and the delivery of or access to advice services.

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<sup>2</sup> Different terminology was in use. Most LANs referred to these two categories of organisations in their LAN.

<sup>3</sup> Twelve LANs were represented in the responses from non-lead partners or members. Eleven of these LANs were also represented in the 32 responses from the leads.

<sup>4</sup> This was a two agency partnership between a hospice and a CAB, which thus differs considerably from the other LANs featured in the report. It is included and provides some useful good practice.

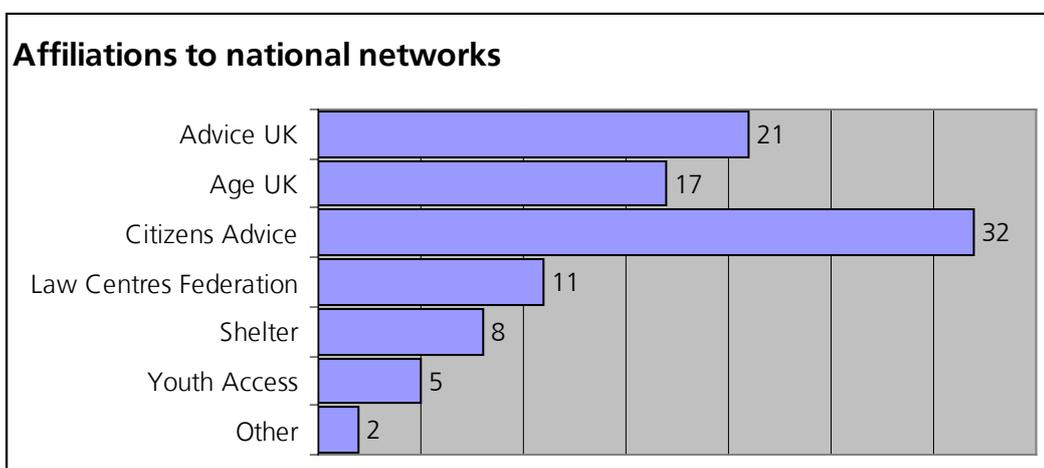
<sup>5</sup> LAN 3's survey response described their two LANs together and are treated as one here.

Apart from the very small and the very large, eighteen LANs had a partner grouping between three and ten. Eight LANs had partner groupings between 11 and 20. Three had 21-30 in the group. One was unclear (but estimated in the report at 11-20).

In terms of the mix of organisations, most were advice agencies. Smaller partnerships tended to be comprised of bureaux and one or two others. On the whole, the bigger the LAN, the more varied the membership. One LAN was unique in having a disability focus and very many disability organisations were involved, along with local minority ethnic organisations as well as some generalist organisations. Medium sized partnerships had more of a balance of types of advice agencies. Larger and medium sized LANs in areas of large minority ethnic communities usually reflected this diversity, with some local minority ethnic organisations in membership. There are considerable variations between LANs with respect to the involvement of local authority and health service organisations. Another area mentioned several Surestart schemes. Women’s organisations were represented in a few LANs. Eleven LANs included private solicitor firms.

Further detailed analysis of partnership and network membership could be undertaken.

### Which national organisations were they affiliated to?



In addition, there were single mentions of these national organisations: Unison, Disability Law Service, DIAL and CVS.

## 2. The LANs approach to management, strategy and leadership

### Who ran the LANs and decided strategy?

This section of the report should be read in conjunction with the appendices, a table including information about size of LAN (partners and members) structure.

Most LANs had the services of paid staff, at least a co-ordinator or a manager and sometimes a small dedicated team, but with varying numbers of full time equivalent hours. The senior staff member often played a key role in strategy, working with and through the governance arrangements. However lead organisations, co-ordinators and employees have had differing decision making relationships and powers in the various LANs depending on several factors.

LANs were made up of a lead partner, other partners and sometimes network members, with an inner core of organisations sometimes called a steering group or even a partnership board, especially if the partnership was medium or large in size. In a very small number of cases, a new, independent partnership body took over from the lead partner organisation who made the funding bid.

LAN projects were often formally managed by a steering group (named as such in 16 cases) and supported or advised by a co-ordinator or project manager. There were also a small number of

“boards” (six), one described as an “advisory board”. These included two boards of trustees described as ‘independent’<sup>6</sup>. Eight LANs explained that strategic decisions were made by “the partnership” or at “partners / partnership meetings”. A final four responses suggested that lead partners or paid staff had made strategic decisions.

Meeting frequency and type varied from monthly to twice yearly. Survey analysis reveals that there were a range of approaches, structures and terminologies in use about structure, governance and strategy.

A few LANs explicitly stated that their activity “stemmed from the strategic aims and direction set in the original Advice Plus business plan”, which would be expected.

References to strategy consultation processes included:

**LAN 5** ‘Broad vision’ is shaped through consultative events (facilitated by the project) involving organisations and the public. Decisions are taken to the Advice Partnership for approval.

**LAN 4** (*By the Trustee Board in consultation with the wider membership*) Only ‘full’ members ... can vote to elect Trustees and to decide policies at the AGM.

**LAN 3** Decisions are made through a local Community Advice Strategy Group (CASG). The [LAN] feeds into this CASG, including nominating named representatives.

**LAN 26** As the lead, we act as facilitators and offer resources to partners and the project team is responsible for making decisions about the strategic direction of the project. However, with regard to the referral system, the partners were all asked what would be beneficial to them and had input in its development through a focus group approach.

It would seem that mostly frequently core partners and the lead organisation, together with a co-ordinator / manager, dealt with strategy and operational matters, using a variety of structures: a core management group seems to be the common factor.

The interpretation of what it meant to be a LAN member or partner varied, as did the differing approaches to commitment depending on the purpose of the LAN. More on this in the section on how members and partners engaged below.

## **Key points**

### **Good practice**

- Paid co-ordination of the LANs was widespread and considered essential by most LANs in achieving the planned outcomes and creating capacity and potential for development.

### **Challenges**

- The research showed that well worked out structural arrangements, including a body with a formal remit to oversee the LAN, were important to good partnership and smooth operations, but necessarily take time, management, and appropriate resourcing levels.

### **Recommendations**

- National bodies could encourage LANs to be clearer about roles and remits regarding management, operations, strategy and participation in decision making, by providing partnership decision making models, typologies, definitions, frameworks and case studies.
- National bodies could engage with the current variations in terminology, structures and roles of LANs, with the primary aim of helping communication, enabling comparisons and sharing of good practice.
- The range of practices that have been developed by LANs could be captured in more detail and depth and shared. Topics could include their role in development, training, user participation, stakeholder participation, liaison, local advice strategies, quality control, convening special focus groups, networking and social policy work.

<sup>6</sup> It was not made clear whether these organisations were constituted separately as charities.

- National bodies could facilitate some form of online sharing and collation to capture and share more detail of LAN activities and good practice.
- National bodies could consider what national body affiliations should be available to new, separate and legally constituted LANs.

## How did the lead organisation of each LAN involve network members and partners in decision making?

### The view from the leads

Lead organisations and co-ordinators / managers involved others in decision making through their governance structures, such as the steering groups and partner groups. One LAN had a series of groups, meeting regularly to discuss operations, marketing, communications and overall steering. Each committee had its own terms of reference. Another steering group that “monitors, advises and guides”, was made up of the team’s Project Manager, the lead partner’s CEO, a bureau trustee, the finance officer and a representative from one of the other partners. Several emphasised transparency and collective decision making, and meetings were supplemented with minutes, reports and email, posted on LAN websites in some cases, and in partner areas of these websites. A Survey Monkey online discussion forum was mentioned.

These are some of the practical or structural ways LANs ensured involvement and clarity:

**LAN 11**, run by a board, consulted the “Partners’ Forum” about their work and undertook an evaluation with them. New trustees were recruited following advertisement to partners.

**LAN 3** [The] CAB is the lead organisation and it delegates decision making authority to the “Project Management Board”. This involves representatives from several initiatives and is coordinated with dedicated time by the Advice Link Co-ordinator.

**LAN 4** explained that they did not have a lead organisation in the way that many others do (e.g. the CAB is the lead in most Advice Plus projects). The LAN is made up of all the Community Legal Service (CLS) Quality Mark (QM) advice centres (plus others) in the district who elect a Trustee Board and its staff are employed (using BLF funding) to provide support to all the members by providing advice-subject training, peer review using Working Together for Advice (WTfA) standards, local liaison with key statutory organisations, social policy campaign work, lobbying /marketing / influencing commissioners / policy makers and other one-off activities.

**LAN 1** has a ‘robust partnership agreement, which includes risk assessment and evaluation framework’.

Some arrangements evolved over time, and a minority referred to difficulties with involvement:

(As well as the Board), there is a “steering group for the network but it has become a practitioners group mainly and a source of information exchange rather than the strategic group it was originally envisaged as”.

(We) sometimes struggled to sustain a collective approach when partners lost funding.

Any major decisions about the project have been placed for discussion at the (partnership) meetings and agreement reached. This has been more difficult when the senior members of partners’ have not attended the meetings in person, as this has been delegated to the funded posts.

There were differing degrees of engagement in a number of LANs of their wider network of members or non-core partners (where there was only one category of organisation in the LAN).

### **The view from the members / partners**

Twenty-five member / partner organisations responded to the question about being enabled to participate<sup>7</sup>. They were either very or reasonably positive about their engagement in LAN steering groups, partner groups or boards. Of the twelve LANs represented in this part of the survey, only one LAN was the subject of specific criticism (see below) and just one more may have been the subject of more moderate concerns<sup>8</sup>.

Members / partners for instance describe how project teams had enabled them to monitor progress (for example with “excellent monthly performance reports”) and discuss problems.

Other positive vocabulary that they used included “actively participated”, “updates”, “regular meetings”, “encouraged to contribute”, “fully informed”, “transparent”.

Examples included:

(We were involved in the decision making). [Organisation] is one of four delivery partners within the partnership and attend all bi-monthly steering group meetings, and has full involvement in decision making. [Organisation] ... has also been involved in recruitment of a co-ordinator and a legal caseworker... The co-ordination and administration of the project has been a key factor in the meeting of the set milestones and (its) success.

All partners are invited to regular meetings where any issue raised is dealt with in a democratic manner.

### **Key points**

#### **Good practice**

- Clarity about remits was achieved in some LANs through written agreements, and terms of reference.
- Regular, purposeful meetings, good record keeping and communications enabled transparency, openness and engagement.
- Some LANs ran consultation processes to achieve buy in and enhance democracy.
- LAN partners and members appreciated being involved in monitoring partnership delivery, and also being active in tasks like recruitment increased ownership.

#### **Challenges**

- LANs were under pressure to deliver outcomes for advice users, so a balance was struck between the imperative to deliver services and meet those targets and activities to enable democracy and discussion.

#### **Recommendations**

- LANs were partnerships and these bodies require time and effort for nurture.
- LANs took a variety of forms depending on local circumstances and require flexible support and frameworks.
- Online discussions for LANs offered in a few areas could be a method to establish.
- Investment so far in the LANs and the partnership development will be undermined without new or alternative funding beyond the end of Advice Plus.

<sup>7</sup> The total number of responses (baseline) was 30 here.

<sup>8</sup> There was one comment that did not address the question, one clearly negative remark and three neutral/ambiguous remarks. In relation to the latter group of responses it was not clear if there was a problem or whether their involvement was not formally planned or expected.

## How were decisions implemented? Did the LAN employ staff or use volunteers?

Almost all the LAN indicated that they had some form of project co-ordinator or manager for the Advice Plus funded network. Of the 32 LAN responses, four were unclear, but at least 25 LANs had small to medium sized teams and the remaining three networks appeared to have one member of staff with hours dedicated to the LAN. Some LANs mentioned freelance consultants. Five LANs mentioned using or anticipated using volunteers.

LAN leads working for independent boards (and in neutral relationships in relation to a host or fund holder) said or implied that they could offer a view and a more impartial function beyond the vested interested of individual services. It would be useful to examine these and further examples to make a more in depth assessment about governance and structure.

Arrangements were sometimes relatively straightforward.

We employ a project co-ordinator who helps implement agreed activities. Each CAB also has an advice session supervisor dedicated to developing the county telephone service.

(Decisions were implemented) by the lead bureau and project manager.

Other LANs reported how they employed teams of staff with a range of roles and expertise: and again there is an instructive variety in approaches and several examples are included below to illustrate this.

**LAN 27** All activities are carried out by the project's team of five paid workers each with a specific skill and area of expertise. Directed by the team's project manager and requests from partners, activities are coordinated to meet deadlines and partner/management requirements.

**LAN 8** The [LAN] employs a full time partnership manager who develops and oversees all aspects of the partnership and its work. The project also employs a full time project manager, a session supervisor and two paid gateway assessors. In addition to this the project uses around ten volunteers.

**LAN 32** The decisions of the [LAN] form the basis of the instructions to the project manager for implementation... A fortnightly supervision meeting between the project manager and lead partner also monitors progress but in more detail. All staff working on the project were specifically recruited.

**LAN 4** Advice plus funding has enabled employment of five project staff: training worker (with budget to buy in quality training), peer review worker, partnerships support worker, admin/finance worker and project manager (who undertakes 'voice' and external networking role).

**LAN 24** Project activities are implemented via a project co-ordinator who is responsible for managing the overall project and liaising with partners / Big Lottery Fund, a project administrator who deals with the daily referral system. These are both paid roles (co-ordinator is part-time). Additionally we have paid employment and welfare benefits advisers (part time).

**LAN 7** (*Decisions implemented*) through the steering group. The project employed just over four FTE of paid staff. Project manager (0.8 FTE), admin officer (.5 FTE), quality assurance co-ordinator (one FTE), gateway / telephone development worker (one FTE) and two project support workers (advice session supervisor (0.5 FTE)).

**LAN 3** Seven hours per week of the advice link co-ordinator hours are funded through the LAN project. The Co-ordinator is authorised to make decisions relating to the day to day delivery of a service operating within the agreed budgets. Any other decisions are in the first instance discussed by the [LAN] Management Board, before a decision is made. In addition, several items are 'taken back' to the LAN membership. In addition to pro rata co-ordinator hours, the project also employs a part-time (fifteen hours per week) quality consultant, a caseworker (37 hours per week and a part time (worker).

There are further details in the sections about engagement and participation below.

### Key points

#### Good practice

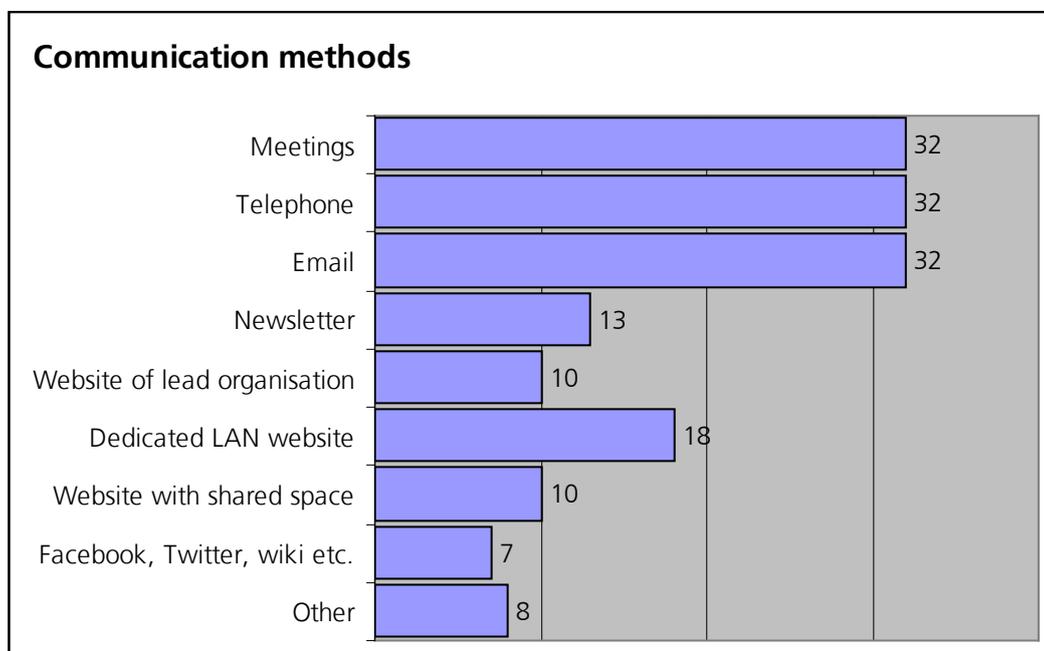
- Most LANs had paid staff; volunteers were only used in a minority of the LANs who responded, so it would appear that paid staff played an important role in the delivery of LAN outcomes.

#### Recommendations

- The variety of staffing arrangements could be explored in more depth to draw out advantages and implications.
- The benefits and disadvantages of independent governance and employment structures could be investigated in more depth.

### How did LANs communicate?

Everybody used meetings, telephone and email. The chart below shows that more than half the LANs had a dedicated website. Just under a two thirds used a website with shared space or the lead organisation's site. Forty per cent had a newsletter. About a fifth used social media.



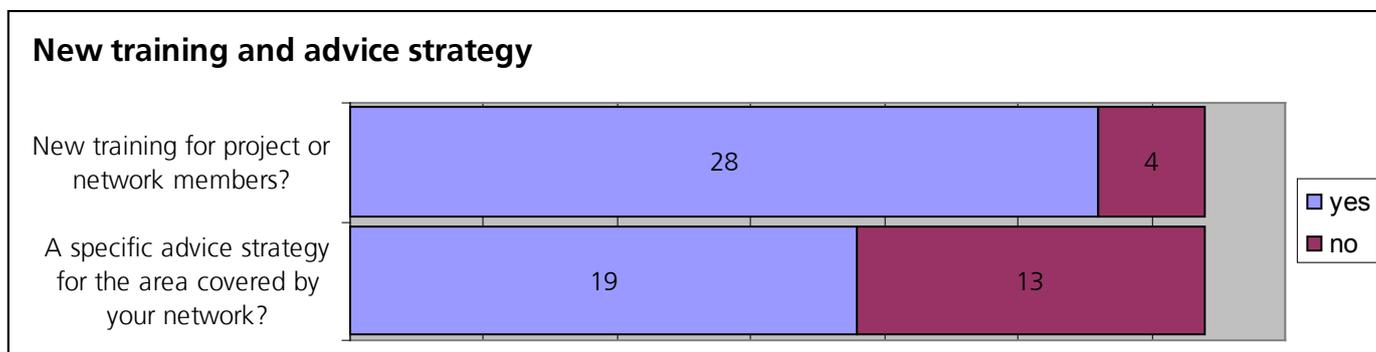
### Key points

#### Learning, recommendations and issues raised

- Maintaining and exploiting good communications systems is time consuming in many ways.
- LANs may need more support and resources to make effective use of communications technology and social media to improve partnership working as well as public awareness.

## How many LANs developed new training or a local advice strategy for the area covered by the network?

The focus of BLF Advice Plus was better access to, and quality of advice for clients. One approach to increasing quality of advice and improving referrals is to train advisers and others. Area wide advice strategies have a number of functions but help with awareness, better referrals and better access in general. LANs were therefore asked about these two approaches.



## What did the LANs say about advice strategies?

Around 60 per cent of the 32 LANs have an advice strategy. As the analysis of the LANs' social policy activities shows, local authorities (key funders) often do not have a co-ordinated approach to the provision of advice and information services. There is often little co-ordination between social welfare advice (housing, welfare benefits, debt, community care, employment) and health and social care services (helping people live independently at home, entitlement to social care, dealing with particular health conditions).

There were mixed responses to the development of such a strategy in this section (see below for more on social policy):

What has been created is joined up advice so that all organisations are clear on what advice services are provided and how these can be accessed. It has meant that organisations freely refer clients to each other. It also provides a means of vital support. For example, the Age UK quality manager post became vacant so the CAB supported them by carrying out supervisions and ... quality reviews.

Occasionally the advice strategy was part of a broader strategy:

**LAN 5** The overarching strategy for the partnership is the Sustainable Community Strategy for the [area]. The project assisted in the review of this ensuring 'Advice and Information' became one of eight priorities for the [area].

Two LANs mentioned problems:

Our plans to develop an advice strategy have been blown off course as partners lost funding, or funding was under threat due to the difficult economic situation that we are all experiencing. When the project was first conceived we had little idea of the problems and struggles we would have just to keep providing services and this situation is getting worse. This has had a negative impact on development plans and focus on the future.

The strategy has been developed relatively recently and is subject to the vagaries of the current political and funding environment. It also became clear that the main area of common ground and thus relevance to the local advice sector was welfare rights advice, as few organisations locally give much advice beyond that, apart from some debt advice, by bureaux and the Housing Associations. The lack of a developed advice sector in (this area) has hindered the development of a network that covers areas beyond benefits and debt.

## **Key points**

### **Good practice**

- An advice strategy developed or participated in by the LAN offered another mechanism which encouraged clarity and helped organisations work together to a common end.
- LANs have worked to integrate advice into wider local strategies.

### **Challenges**

- LAN partner and member service delivery sometimes had to take priority over strategic development, especially in times of loss of resources.

### **Recommendations**

- There are considerable local area variations in advice services throughout the country so the potential for advice strategies is variable. There is probably not a simple template in terms of process or content.
- LAN advice strategies can attempt to address significant strategic gaps in co-ordination of local authority funded social welfare advice and local social care services.

## **What kind of training did the LANs develop?**

Nearly 90 per cent of the LANs developed new training through the BLF Advice Plus funding. LANs delivered a large amount and very varied training. Types of training appear mainly dependent on local need in the context of national developments. LANs mentioned their training needs analysis (LAN 32), or occasionally local strategies were linked to training in the responses.

These are the kinds of training programmes the LANs delivered often to staff, and volunteers across the LAN:

- Provided system training and LSC eligibility check training.
- Developed training programmes: for new volunteers to train for two national qualifications and for support workers and advisers on social welfare issues.
- Provided training and capacity building for volunteers around quality and advice giving (using under spend).
- Ran a training programme for experienced advisers and for less experienced advisers/support workers.
- Held training and information sessions on social security benefits, debt, community care, employment and housing.
- Ran training on quality assurance, welfare reform and housing.
- Held training covering debt, welfare benefits and housing.
- Ran signposting and referral training.

Other approaches included:

- Opened up existing training or providing bespoke training for LAN members.
- Held updated (training briefs) sessions on the core advice topics for other third sector groups (i.e. a wider network).
- Invited members “to attend the Bureau training session and more specific sessions are arranged where appropriate”.
- Commissioned training for frontline workers from partner agencies together with public information.
- Hosted a range of training courses and workshops on “issues thought to be relevant to partners”.

**LAN 27** Ran training in improving quality standards and seeking a quality mark. Preventative training through financial capabilities was offered to partners in money management. The IT consultant/Project Manager were also on hand to train users on the partnership’s bespoke referral system, RADAR.

**LAN 31** Stakeholders from local authorities and MPs caseworkers have attended events.

**LAN 25** (developed training for front line workers which were) very popular with one running every couple of months.

**LAN 24** is also working on an [area]-wide training plan for the changes in universal credit and other benefit changes later in 2012/13.

**LAN 21** (said their training had) exceeded all its targets (and they have) uncovered a real need for good quality benefits training. The imminent welfare reforms have highlighted this for many organisations.

## **Key points**

### **Good practice**

- LANs appear to have enhanced access to training and created new opportunities for training for a wider range of organisations by opening up existing training or providing customised training or commissioning specialist training from partners.
- There is some evidence of LANs assisting with strategic, area wide approaches to training on specific benefit changes.
- LANs have offered training in preventative work (for example on financial capabilities).

### **Challenges**

- Advice related training offered by LANs should be a continuous process, and comprehensive, and resourced accordingly, beyond the end of the BLF funding.
- Nationally led changes in legislation and funding created increased need for training by LANs.

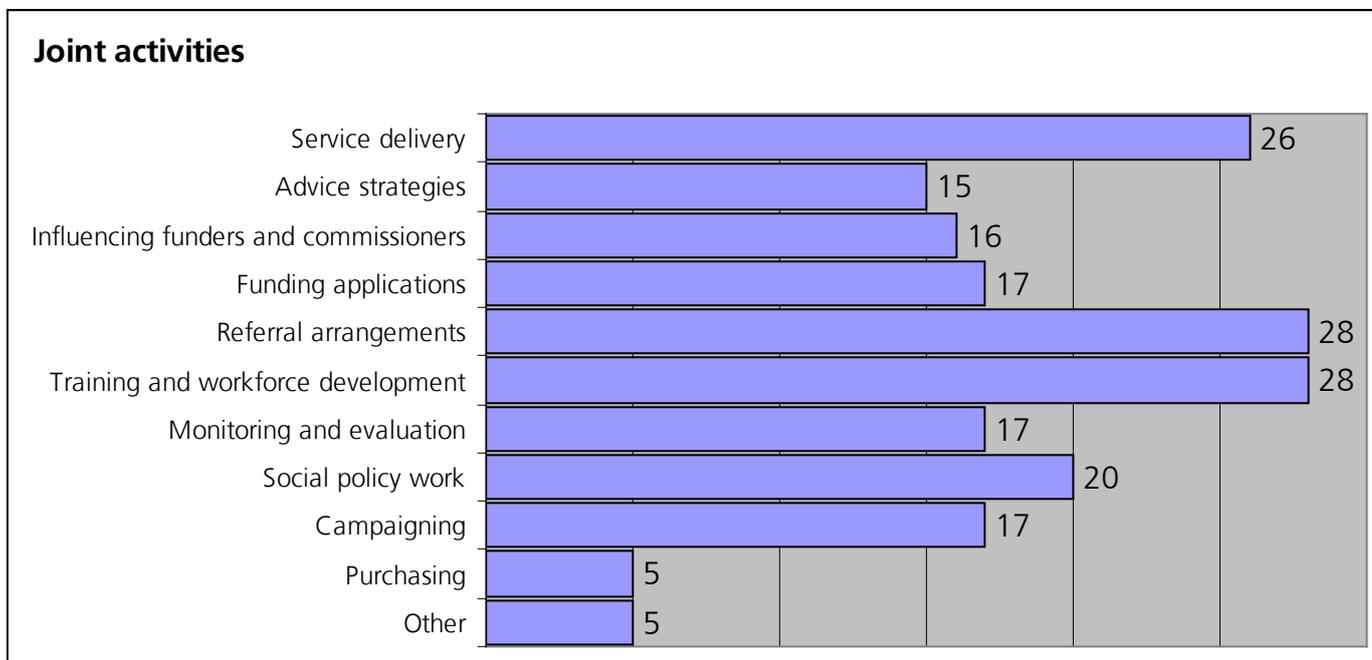
### **Recommendations**

- Any increased dependence on the use of volunteers to give advice in the advice sector brings with it the need to increase quality control and provide support and training.
- There is a very wide range of training that has been developed or could be developed that is essential for the advice sector to be able to provide accessible and quality advice that is up to date and delivered in an effective way. LANs have the potential to increase access to strategically identified training across their areas.

### 3. What the LANs did as multi agency networks

#### What did the LANS say about their joint work?

As the chart reveals, the LANs undertook a wide range of activities. They provided a rich source of detail in the survey. The main emphasis, in keeping with the BLF Advice Plus focus, falls on service delivery, referral arrangements, and training and workforce development. Social policy work also features frequently.



There follows a sample of the activities they used to reach more clients, and activities to improve the quality of advice. The LANs took time in their responses to share this wealth of information about their joint work to reach more clients and improve outcomes. The activities are listed in three broad headings:

- Developed service delivery (strategies, new services, new client groups, outreach, promotion, telephone lines, common systems etc.).
- Influenced funders and commissioners.
- Social policy work at several levels.

#### Developed service delivery

- Developed strategies to ensure coverage for clients by main agencies including analysis of current trend.
- Developed common and sometimes online referral models, systems and referral arrangements (see below).
- Single access point telephone number.
- Enabled referral by probation and the police.
- Trained more volunteers and paid staff (There were some substantial programmes).
- Translated materials “(in six languages) for use with East European clients who speak no English, at initial point of contact at reception, to explain system for making appointments and to arrange booking a translator”.
- Offered new services relating to welfare benefits, housing benefits, pro bono advocacy, older people, gypsy and traveller communities, disabled people, migrant communities, business community (for debt advice), advice needs of offenders (with probation service).
- Ran awareness and take up campaigns, e.g. multi agency county wide initiative on financial inclusion.
- Developed service standards for social housing tenants.

## **Influenced funders and commissioners**

- Participated as members of key strategic bodies relating to advice.
- Formulated advice strategies, e.g. a mid term state of advice and the sector report.
- Gained agreement to ring fence council/NHS grants.
- Briefed politicians on state of advice.
- Held key stakeholder events to demonstrate impact of advice services.
- Responded to and provided detailed advice within pre-commissioning processes.

## **Social policy work at several levels**

- Established a tool on the website for reporting and generating key issues about housing benefits and meetings with Benefits and Revenues as a result, to improve practice. Supported the Employment and Support Allowance Group to do the same.
- Agreed the content of the calls for evidence. Providing evidence in the form of case studies. Guided the development of the report structures. Contributing to the final reports. Assisted with and monitored the effects of campaigns with funders and commissioners.
- Submitted joint commentary on welfare benefit reforms.
- Held joint liaison meetings with local agencies e.g. Job Centre Plus, housing benefit and council tax debt recovery managers to improve practice.
- Published a good practice guide to ensure consistency in reporting money raised.
- Wrote new chapter for the Joint Strategic Needs Assessment (JSNA) on debt, deprivation and health intended to influence the housing and welfare benefit strategy and decision makers.
- Responded jointly to consultations on legal aid, localism, health, migration and UK Border Agency, child poverty strategy, housing strategy, welfare reform bill, disability living allowance reform, flexible tenancies, GP commissioning, housing benefit changes.
- Campaigned together, e.g. on legal aid, including motion through full council, public demonstration, press and media coverage. Poverty hearing at council with local Quakers.
- Lobbied local politicians, MPs and key government departments.

## **Key points**

### **Good practice**

- Individual LANs developed activities jointly which ensured coverage, raised awareness, improved access to appropriate advice, targeted specific groups who were more disadvantaged (or in greatest need), and improved the services of statutory agencies.

### **Challenges**

- LANs had to balance the different strands of their joint work to deliver or sustain services in a time of decreasing resources but increasing need.

### **Recommendations**

- It would be instructive to create individual LAN stories or case studies, and make further comparisons about joint work.
- It would be valuable to undertake a more in depth study of LAN approaches to and outcomes from social policy work.

## **How did they work together to provide quality advice?**

### **Workforce training and development**

- Undertook training needs analysis.
- Developed and delivered training, e.g. for experienced advisers by external specialists and for introductory/sign posting staff by their own staff for basic level.
- Established and supported network groups.
- Developed apprenticeships.

## Standards, monitoring and evaluation

- Benchmarked processes.
- Agreed KPI's.
- Agreed quality standards.
- Agreed outcome based framework on complexity.
- Created good practice guide on dealing with missed appointments.
- Adopted peer review: the Working Together for Advice Quality of Advice projects file review standards and procedures, and trained in their use. Ran 'mock audits' with feedback and support. "We have now completed these with all 20 of our 'full' members (i.e. those with the CLS QM 3 at General Help level or above) and have started work with some of our 'associate' members<sup>9</sup>."

Training also contributes to the quality of advice services, and from the previous section on training, it is clear that LANs devoted time and resources to training and therefore to improving quality of advice. On the other hand, there appear to be fewer examples of work undertaken by LANs on the other elements that contribute to the quality of advice and outcomes (e.g. standards, monitoring and review).

Improving quality was an area in outcomes where LANs said they had done less well. This seems to be reflected in the amount of detail provided through the survey. Some LANs experienced difficulty getting commitment to achieving quality standards with independent, sometimes smaller organisations (see below).

## Key points

### Good practice

- One major method used by LANs to improve advice quality was training. But there were also examples like benchmarking, shared standards, indicators, peer review, audits, an outcome based framework on complexity.

### Challenges

- The lack of a unitary or standardised or comprehensive approach to quality in the advice sectors appears have been an issue. In particular, the ongoing uncertainty about the future of the General Help Quality Mark (now the Advice Quality Standard) in the social welfare advice sector held LANs back.

### Recommendations

- There is clear appetite from LANs for a nationally-recognised quality standard that audits the quality of advice.
- LANs efforts to address quality could offer a source of evidence for future work on quality.
- Quality of advice also depends on resources for training of advisers and cover for adviser time spent on training and professional development.

## What other joint work did they highlight?

These examples were interesting and the lessons or the approaches might be transferable:

- Purchasing - joint agreement for buying stationery etc.
- Acquired buildings for advice services usage/ownership
- Administered a small grants scheme for individual clients.

## What meetings and activities did the LANs lead locally?

Several LANs have become the natural focus for a number of related meetings and activities, by virtue of their adopted role as a local multi agency grouping on advice, or because of the prior role and status of the lead partner. The variety reflects the different circumstances and aims and objectives of the LAN, and were in addition to their steering group, partnership or board meetings focused on management of the LAN.

<sup>9</sup> This LAN argued that these standards should be introduced "into the new (Advice Quality Standard) as they are recognised by all our members as meaningful, relevant and appropriate. We strongly encourage the Advice Service Alliance to continue to seek funding to incorporate the WTfA QoA file review standards and processes into the new (Advice Quality Standard)."

Activities included: social policy meetings, events and campaigning, training, workshops, local advice strategy development, service development, forums for network members, chairing/convening meetings with specific foci (for example on child or fuel poverty), networking meetings, liaison meetings with other key stakeholders (e.g. council, job centre plus, housing benefit/council tax recovery).

Some particular approaches to local strategic leadership are noted here:

- One LAN holds quarterly meetings of service users and also separate quarterly meetings for “volunteers with information and advice on service developments, gaps in service and waiting times...” They also hold annual conferences for advice agencies and a half yearly ‘planning meeting’.
- In another area, the LAN facilitates “joint working” amongst the CAB managers and chairs by chairing their quarterly meeting.
- Elsewhere, bi-annual quality control meetings with the delivery partners discuss issues of advice quality and training needs.
- LAN 4 co-ordinates a number of meetings on behalf of partners: LSC Consortium, City Council Ring fenced Agencies, Sustainability Group, Community Care Network, Immigration Network in conjunction with Immigration Law Practitioners Association (ILPA). In conjunction with City Council, Joint Planning Board.

## **Key points**

### **Good practice**

- LANs played an important role through leadership and facilitating a range of activities:
  - Meetings with service users, and with volunteers.
  - Conferences and annual planning for advice agencies.
  - Support for partnerships with statutory agencies.
  - Assisting with local difficulties between or within agencies.

### **Challenges**

- Agencies especially small ones needed sufficient capacity and resources to engage and participate fully in LAN and local joint strategic and operational activities.

### **Recommendations**

- A resourced LAN with good governance and membership is potentially well positioned to offer leadership: strategic and operational meetings relating to a local area or a key advice issue can be valuable but they are resource intensive and require good co-ordination and facilitation, and follow up.
- LANs should be clear about differences between the meetings and activities they facilitate and focus appropriately: advisers have different needs to people with responsibility for funding services or influencing strategy.

## **How did the LAN use websites?**

Eighteen of the LANs (55 per cent) had a dedicated website, as the chart above on communication methods showed. Other LANs had websites pages about the LAN on the lead’s and other partners’ sites.

Dedicated websites varied:

- Basic and static pages including the LAN’s services, contact details and perhaps an online contact form.
- More elaborate and interactive offerings, with search, databases, and hosting the electronic referral systems.

Examples of material targeted at LAN partners and members included:

- How to join the network.
- Common referral form.
- Referral tool (proprietary or bespoke).

- Interagency referral.
- Search facility for establishing agencies who can “help”.
- Social policy reporting tool.
- Other resources, tools and templates on topics such as quality, preventative measures and service delivery.
- Consultation responses.
- Key policies for LAN members.
- Details of all events.
- Publicity about training.
- Presentations from meetings.
- News items.
- Gateway for specific project led programmes.
- Gateway for online volunteer recruitment.
- Statistics collation (“automatic”).

Content directed at advice service users included:

- Directory of advice services.
- Advice and information to the public both downloadable and website links.
- Piloted email access to advice as well as client feedback page.
- Email advisor function.
- Database of providers searchable by enquiry and postcode with links to googlemaps, and a smart app version.

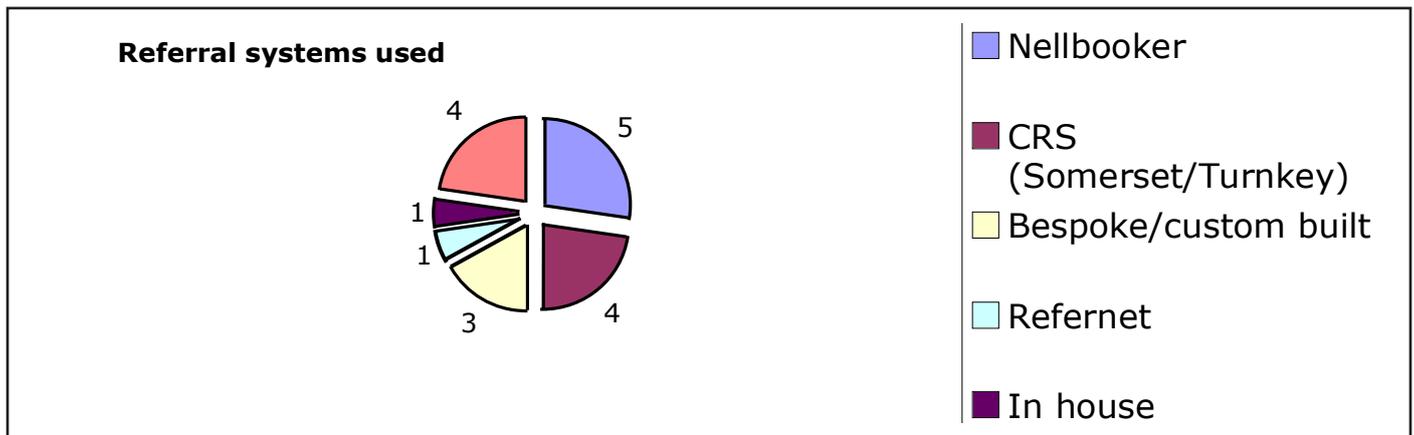
The responses below illustrate the more complex sites in use by the LANs.

Somerset Common Referral System (CRS) allows secure transfer of data to agencies with email alerts and notifications. Monitoring of the case status and full reporting facilities. Hosts a Common Referral Form. Includes a search facility for establishing agencies (that) can “help”. Connects to Facebook and Twitter. Advertises the training. Rolling latest news. Partner Information Project. Information on how to join the network

**LAN 9** (bespoke) website has an advice seeker and partner interface, with a range of accessible advice, e.g. links, email, postcode searchable advice agency database. The partner interface has: partner information, social policy news, a live news feed linked to their Twitter account, an events feed with an RSS link. It also hosts resources including newsletters, briefings and press releases, and includes downloadable tools. One of these is an innovative ‘foodbank mapping’ tool that allows individuals and agencies to search for their nearest provider of food parcels. Visitors are able to join (the LAN) through the use of an online expression of interest form.

**LAN 6** (Nellbooker) Developed LAN website, in two parts. First, it’s a search engine for people seeking advice, secondly it has a members section, which includes all consultation responses (national and local), lobbying and campaigning materials, social policy reporting tool, up to date library of key policies for use by all members, minutes and notes of relevant meetings.

The chart below indicates which proprietary software and other systems were in use. These included Common Referral System (CRS), as in Somerset (by Turnkey), Nellbooker, and Refernet. Others were described as bespoke, custom or in house systems (includes RADAR in LAN 27). There were trials and pilots in a few places. Four LANs did not use electronic referral systems (shown in pale pink below).



### How many LANs were using electronic referral systems?

Fourteen LANs were using electronic referral systems. LANs that did not have electronic referral systems were using email or fax. Two more LANs were establishing electronic referral systems. Nearly 60 per cent (19) of the LANs should thus have some form of electronic referral system in the near future. Nine LANs said they were not using (and did not mention they were due to have) an electronic system.

**LAN 20** is piloting use of the common referral system (CRS), which was developed originally by Somerset Advice Network. CRS provides a simple mechanism for referring clients between organisations and tracking progress. The system allows secure transfer of data to agencies with email alerts and notifications, together with monitoring of the case status and full reporting facilities.

**LAN 27** uses a custom build referral system designed specifically for the advice sector. The system allows them to reject, forward and track all referral operations within their bureau. The software is web based, secured using SSL and data encryption, requiring only a browser.

**LAN** developed this in-house: it is a system protected by a secure socket layer which allows front line workers from community based organisations to refer their service users with social welfare law problems by completing a simple form briefly detailing the enquiry, client's name address and contact details. This is received into a central mailbox at [the CAB], which generates an automatic receipt to the sending organisation. The administrator then passes the enquiry to the partner who is best able to help and if it is transferred the referrer receives a response updating who is dealing with enquiry. There are strict protocols regarding response times, dealing with emergencies etc.

### Key points

#### Good practice

- LANs have identified a range of ways of delivering more joined up advice services (for advice service users and for advice agencies) through the use of web based and electronic information, communication and systems and there will be considerable in depth experience that could be tapped
- Online systems can provide a mechanism for feedback to the referring agency.

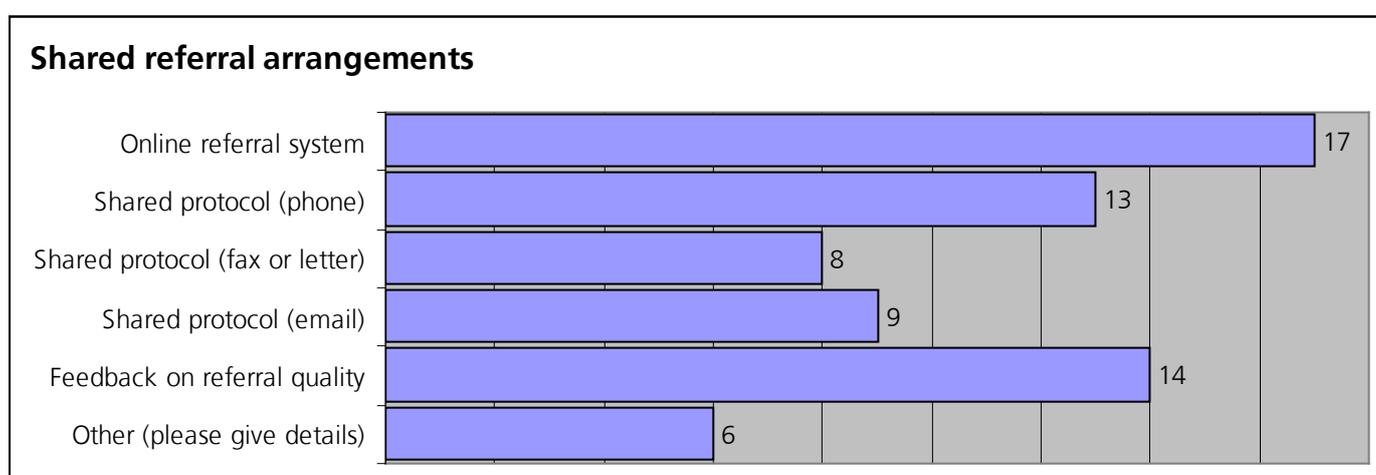
## Challenges

- LANs by definition included partners and members with varying capabilities and capacities in terms of IT infrastructure and support and must chose IT systems that suit diverse partners.

## Recommendations

- LANs have to undertake considerable work to understand referral practice and IT systems before selecting a particular one and this needs more resource.
- It would be valuable to know more about the marketing of LAN websites, and feedback from the public. Further questions could be asked about user figures and usage (which functions, which pages) generally.
- LANs could be supported to develop a common approach to data protection.
- There is still a need for resources for delivery of advice by telephone and email in LANs.

## What kind of common systems were used by three or more organisations in the LAN for referring people?



78 per cent of the LANs (25) were clear that they had 'common systems'. One third (13) referenced their electronic referral systems sometimes, and a few mentioned the associated training, referral guides, policy and protocols. Two LANs said they were in the process of setting up systems. Three LANs said they had no common systems. The final two were one unclear and one 'not applicable'. In other words there were seven LANs with no common systems at the time of the survey (over 20 per cent).

The common systems outlined varied from the basic to the more complex. Complex systems have been described in the section above about websites and electronic referral. The telephone remains favoured, and still faxing plays a role<sup>10</sup>.

- Common/shared referral forms.
- Common assessments, processes and data sets.
- Use of triage.
- Referral protocols .
- Adaptation of the CLS referral protocol.
- Basic shared protocol 'to avoid complexity'.
- Telephone referring.
- Dedicated telephone line and clients given local bureau number.
- Email referral to a lawyers group.
- An email based referral form for "members outside the consortium".

<sup>10</sup> With its concrete paper form, which seems to confirm transfer and can be destroyed as necessary for confidentiality.

**LAN 14** explained that due to differing client confidentiality policies the system that works for them is fax. Clients are referred in from a partner and they are recorded on the database (Excel spreadsheet) and, depending on the type of advice needed, are distributed to the appropriate delivery partner. The referral is then progress chased and the delivery partner is paid for the work done on closure of the case.

**LAN 27** (bespoke) operates a common system across 50+ organisations providing seamless referral channels across the region. They can fully administer referral contracts between partner organisations to provide varying levels of referral agreement ranging from a simple referral through to making a booking direct to a partner diary. They feel the system will facilitate an effective coordinated advice hub, linking all advice providers in the area.

In **LAN 18** callers access the Helpline where a gateway (triage) assessment of the client's problem/query is determined and then next steps (are) advice, information, or signpost. (For advice) a generalist appointment is made with the CAB or other partner, and a specialist appointment with a solicitor partner. Referral and outcome documents are sent to the referral partner by supervisors at the helpline.

**LAN 3** said they had electronic referral between community groups and the LAN and fax and phone referral protocols for referrals between partners but intend to extend the electronic referral system in the future.

## **Key points**

### **Good practice**

- It is interesting to note the number of different approaches used in LANs to create a more joined up approach and a better experience for the advice service user: common features could be pinpointed through further research and analysis.

### **Challenges**

- Communication and effective common systems, electronic and otherwise, shared by LAN members and partners were very important to the journey towards seamless services. LANs sometimes had very diverse participants and have had to work in a context of pre-existing systems or plans for systems. It was a considerable challenge to select the right one, get buy in, implement and establish active usage.

### **Recommendations**

- Good common system development in LANs should involve all the stakeholders especially those on the front line who refer clients and will use the common approaches on a daily basis, as well as service managers.
- It may be that diversity in organisations and users means that there could never be a common (electronic) system that suits all, and this could be debated more fully.

## **How well did organisations engage in the LANs?**

Nine (28 per cent) LANs reported no issues relating to engaging organisations. One spoke of being oversubscribed and having to limit membership. The other 22 (69 per cent) leads described the level of engagement in some detail. They indicated that there was a considerable variation in participation. However most leads were realistic about the level of engagement. In fact, when asked about factors for success, leads appeared to experience low or sporadic participation from particular members/partners as a limitation but not a factor in 'doing less well' (see below).

The following table shows LANs according to size of partnership (in this case number of partners and members) as stated in their response and then an approximate assessment of the engagement based on an analysis of their answers.

Size of LAN	No.	Engagement mainly positive/ positive	Engagement qualified/ variable	Engagement problematic
<10	18	6 (33%)	11 (61%)	1
10 - 20	10	6 (60%)	4 (40%)	
20 +	4	1 (25%)	3 (75%)	

It was not possible to judge systematically across the responses how serious any lack of engagement was, where qualifications were made or there was a report of variable engagement. The number of larger and medium sized LAN reporting issues was lower than the smaller LANs. However, reading closely one medium sized LAN admits only to have had only 50% active participation of partners. The smaller LANs were more vulnerable to poor participation, with four of fourteen describing a range of issues that must have impacted negatively on their experience.

Smaller LANs were almost entirely led by Citizens Advice Bureaux. Bureaux as partners received a mixed press. Bureaux leads were themselves sometimes 'self critical' and there also have been funding losses and mergers that have created issues. In some partnerships they were the active engaged organisations but there were also mentions of low participation and other problems with bureaux, which suggests a lack of consistency.

Citizens Advice Bureaux have participated from the outset of the network but to varying degrees, normally as a result of the personal engagement of senior staff. When there have been engaged chief executives of bureaux this has resulted in greater involvement in the project, whereas others have more internal focus. This is generally true of all agencies, but the variation has been most apparent with bureaux who provide a ready point of comparison, particularly where there has been a change in leadership. There has also been less engagement from some of the smaller advice agencies who specialise in particular client groups. Again this may have to do with individuals but is often the result of the pressures of maintaining services.

As an illustration of the contrasts revealed by the survey, one large network had fourteen fully engaged members, ten partly engaged members and three members who hardly engaged at all. Another smaller LAN did not seem to have many fully engaged members at all.

LANs have provided valuable commentary whether the experience was considered successful or less satisfactory. For instance, the first statement captures the positive spirit of the replies and offers some helpful good practice:

Some lead agencies do not engage as much as some others, and there are those smaller organisations that are unable to participate as much as they would like due to resource constraints. However, and recognising that partnership working is complex and challenging, we employ a range of methods and channels to ensure we are engaging as widely as we possibly can. Our feedback from partners and wider agencies is generally excellent, and we work hard to ensure we representing the wider advice sector. However, we will be reviewing the make-up and functioning of the partnership as we move forward, and where necessary will explore new ways of working.

A few specific organisations were named as not participating to greater or lesser extents in particular places. They included Citizens Advice Bureaux, Shelter, DIAL, Age UK, the local authority, the health service, some private solicitors. One LAN reported that information and advocacy groups for specific ethnic communities had not engaged much even though they were sent information and invitations regularly. This shows that it is not just small organisations that are constrained or reluctant to participate. On the other hand, in each of the cases mentioned above, there were examples of LANs where the same organisation in a different locality was an active member.

One LAN commented on the difference between delivery and other categories of partners.

**LAN 24** The delivery partners tend to work together well as they have common aims and objectives. The support/advocacy partners rarely use the Project or engage, partly because they have their own funding arrangements for advice. However we are here should they need us and they do still refer clients in and take advantage of some of our training opportunities.

Incentives to engage are relevant and were mentioned by three LANs:

**LAN 26** We pay each partner £100 for each partnership meeting attended so this helps.

**LAN 19** With no financial incentives and the need for partners to invest time and effort into working at self-improvement, we found it difficult to engage with the partners beyond the regular meetings and in using tools such as RADAR that made their working lives easier. The referral system proved very successful because it was simple to use, speeded up the referral process and available at the touch of the button. (One organisation in the network) embraced the system and used it to manage all of their appointments and referrals but even though they were interested in the new quality mark, they were not interested in participating in the quality training.

**LAN 6** said that smaller organisations have required more one to one support on a range of issues and are less likely to attend meetings, but do attend network meetings. The challenge has been to offer a range of actions/support which different groups get involved with at different times to suit their needs and requirements.

Another LAN lead explained how one relatively dormant network member who provided assistance with the completion of social welfare benefit application forms, appeals, and represented clients was then motivated to make use of the LAN quality related service. This happened when the local authority enforced its requirement for grant recipients to have quality mark and threatened funding cuts.

As reported above, in the LANs who responded to the survey, there were a variety of expectations and experiences concerning engagement. In some LANs there appear to have been 'tighter' relationships where ongoing commitment was required because of funding and service delivery. In others the arrangements were looser where the aim was awareness raising and the development of new relationships.

## Key points

### Good practice

- LAN employed a range of methods and channels to encourage wide engagement and participation, and use a feedback form.
- Incentives (financial, for instance payments for attending meetings) and tailored support were used to motivate smaller and less well resourced organisations to engage in LANs.
- Some LANs made strenuous efforts to represent the wider advice sector.
- LANs suggested the necessity for reviewing the make-up and functioning of the partnership.

### Challenges

- Partnership working is complex and LAN co-ordinators and lead bodies have had to work hard to realise benefits for all partners and members.
- LAN members and partners sometimes made use of one element of the LAN activities but did not contribute or engage with other elements (e.g. quality requirements).

### Recommendations

- Participation in LAN governance and joint activities varied, and further inquiry could reveal more about the benefits for different organisations.
- There do not seem to be any straightforward conclusions to draw about the size of LAN partnerships or their make up. Most sizes and configurations worked well enough somewhere.
- Funders and national networks should in consultation devise ways to further incentivise and support partnership work in LANs to increase active and positive engagement.

The next section explores the challenges further.

## What were the barriers to participation?

All 32 LANs made observations and often listed a cluster of reasons for difficulties in engagement. Most commonly mentioned were time, funding or finances, resources (staffing levels, for example), followed by capacity and interest/willingness. Pressures included other funders' strict targets and giving the "core service" precedence. A few LANs were pessimistic about strategic development in the current constrained financial environment, and at least one spoke of specific agencies where strategic skills and understanding of partnership work were weak.

There was a sense that without access to specific funding, organisations could be reluctant to engage, despite the potential of benefiting from the LANs arrangements to improve access for advice users and quality. There were also comments about partners wanting to continue offering advice, "but not in a structured or monitored way."

Partner/Member **LAN 4** The main part of the [LAN] revolves around service delivery and a referral system, (so) if the partner does not have clients needing advice then they don't engage. We were hoping... to create a much more pro-active [LAN] but the demand for our services has been so high and our capacity so limited that we have found ourselves throwing all of our time and energy into simply supporting the referral system.

We had a difficult time because [the LAN] (was) set up to work on quality, and ... this meant delivering messages to some partners (following for example, client surveys or a mock audit exercise) that they did not wish to hear about the quality of their service.

**LAN 3** I don't think there are any barriers. We take every effort to vary the venue for meetings, always making sure that access issues are duly considered and properly addressed. Time is probably the biggest barrier that network members face. None of us feels like we have enough hours in the day to do everything we would like to in terms of developing and

delivering services. The project did not provide for management costs at each of the partner organisations so they were limited in the amount of management time they could dedicate.

The operating landscape in 2012 is significantly different to that evident when the business plans were written in 2008. Financial and other pressures in partnership organisations have led to a cautious and in some cases negative approach to engagement. The solicitor (firms) in particular are reluctant to engage where fee income is lost through time devoted to the [LAN]. In addition they recognise that improvements in systems, procedures and ultimately client experiences will, over time, lead to potentially reduced fee income. One partner in particular has not recognised any benefits flowing to their clients from collaborative working and does not engage at any level.

Competition for funding, local funding relationships and general competitiveness were mentioned four times. A LAN can be perceived as a competitor by some agencies including CAB. Partners within a LAN can be in competition with one another for funding, and to be the first choice provider of advice for their locality.

Generally, resources are limited and there is still an air of competitiveness between partners, which hampers the transparency and openness that would benefit all. This was particularly obvious in terms of the quality strand of the project where none of the partners were willing to open themselves up to a friendly audit despite the fact that it could be particularly beneficial to some of the smaller organisations.

Geography, openness and trust, appropriate advice surgery space (for outreach work), the ICT infrastructure in outreach venues were identified as problems and received one mention each.

A LAN lead with a target minority client group suggested that they had difficulty gaining engagement sometimes because LAN members/partners did not have this group specifically “on their own work agendas.”

In a few cases a series of circumstances conspired to privilege one partner and hamper another’s engagement. Staff changes, reorganization and restructuring, or funding loss tend to exclude, and then it was suggested, the organisation that led a service ended up “driving” the LAN.

## **Key points**

### **Good practice**

- LANs appeared to appreciate and want to address the barriers to participation (most commonly mentioned as time, funding or finances, resources (staffing levels, for example), followed by capacity and interest/willingness).

### **Challenges**

- Most organisation did not have surplus capacity and had to focus on service delivery and meeting targets.
- Partners (and members) not receiving resources or obvious benefits from a LAN initiative were sometimes less easy to engage.
- The challenge for several LAN was to get all agencies, with or without a share in the LAN’s funding, to adopt the vision of a seamless service offering quality advice through a partnership approach.
- Some partners and members did not appear to their lead to have the vision or capacity to address strategic issues.

- Joint work between organisations even in a partnership on quality required trust and openness and this made some organisations feel vulnerable.
- Practical matters like geography, good outreach space and ICT, an staff changes all impacted on inclusion or willingness and ability to engage.
- Involvement by private solicitor firms was sometimes limited by commercial considerations.

## Recommendations

- Citizens Advice may want to explore questions about capacity and lack of strategic skills in some bureaux. All national bodies could also consider whether there is a need to promote more actively the value of partnership working.
- Better understanding and definitions of what is meant by advice should underpin advice services and LAN approaches. Advice varies in terms of advice area/topic and level of support offered (self help, one off advice, casework, representation, specialist etc). The type of advice should address the needs of particular client groups, the level of demand, and ease of access.
- Particular groups of (potentially “in most need” or under represented) advice service users (for instance, gypsies and travellers) with specific access and quality issues should be explicitly named in work plans and strategies.
- Participation in partnership requires resources including management costs.
- National bodies and funders should continue promoting and supporting positive partnership.

## Have there been conflicts relating to funding?

Over 60 per cent of the LAN leads (20) said there had been no conflicts relating to funding although there were indications that a few anticipated problems in the future.

Four (12.5 per cent) leads said there had been conflicts and these were dealt with in a variety of ways. “Everyone was aware but it wasn’t really discussed”. Another LAN said that open and transparent discussion had led to some conflict being resolved.

A further 25 per cent (8) described how funding had caused issues and implied a degree of conflict. Shelter was specifically mentioned by two LAN leads because of their national decision not to bid jointly at local level. Only one was successful. The other lost funding locally. One LAN spoke of flagging up potential sources of funding to one another. But another LAN explained that partners became cautious and “held their cards close to their chests” in relation to joint activities.

One key partner agency secured most of the funding for contracts in the area, which created conflict with other agencies at a time when they were losing funding and resources. This lack of resource meant that several partners decided to step back from the project and new partners were identified.

There were a number of relevant suggestions about reducing conflict, largely based on formal and informal agreements, dialogue, co-operation and declarations of interest.

**LAN 12** We brokered a deal around the LSC funding contract in 2010, which has so far, largely held together, around who would do what, where.

**LAN 15** We have agreed a protocol with Citizens Advice (...) to address such a situation.

**LAN 4** There has been competition for new funding pots...(but) people expect that to happen and declarations of interest are made at the start of all board meetings...It is a key role of the network and trustee board to try to reduce conflicts by maintaining good communication and

mutual understanding...(We do not) become involved in working with any single member (or sub set of members), because we are employed by the entire network...(P)roject staff (mainly the manager) do represent and advocate for advice sector funding as a whole...

**LAN 16** But the partnership has provided a forum for discussion, dialogue and cooperation. The strategy has been a useful tool for organisations to focus on joint strategic targets and show where they are playing a role. Partners recognise the need for collaborative working as beneficial to organisations individually and for clients.

**LAN 6** The project has been heavily involved in creating and shaping local funding opportunities. This has led to some concerns about the independence of the post (I am hosted by [Area] Trust who are a local advice provider). Steps taken to resolve this include: signing confidentiality agreements with commissioners, restricting flow of commercially sensitive information from me to [LAN] Trust (or other partners) and a clear distinction between my role as 'technical advisor' and 'panel member' on funding panels. We are also currently exploring my collocation with the [area's] partnerships team.

## **Key points**

### **Good practice**

- In relation to competition for funding, there were examples of shared information, openness, brokering, informal and formal agreements, protocols, use of the advice strategy for joint targets, dialogue, cooperation and declarations of interest.
- Some LANs have shaped and influenced funding strategy, and in one place had to take on board the need for fairness by adopting confidentiality agreements.

### **Challenges**

- Conflict about funding was seen as something to manage; some even argued that they expected to have to compete with others.
- Funding did cause some organisations to be more cautious and not collaborate so openly.

### **Recommendations**

- Funding is clearly recognised as a tendentious area and is best managed through openness, agreed processes and structures which aim to minimise issues, avoid destructive competition and maintain good relations.

## **Have there been difficulties (other than funding) between LAN members?**

Twice as many LANs (21 said there had been no significant difficulties as reported major or minor conflicts (11); that is two thirds of those leads who responded.

Positive comments included;

Trust has really built up over the last three years. Still a bit of rivalry ... but fairly contained. The trust element was highlighted as important by partners in the recent evaluation of the project.

Everyone seems very keen to work together and they see the [LAN] as a way of keeping their own agencies going...

Working in partnership has proved to be a very positive experience.

Some of the issues from the one third of LANs with reported conflicts:

- Members have clashed over local service delivery issues.
- Partners have disputed about legal advice in a particular case.
- Major difficulties at the beginning of the project.
- Many minor difficulties.
- The “usual undercurrents concerning quality of advice offered by some members”.
- Agencies being less than honest about intentions.
- One of our partner agencies raised a complaint about the project not being inclusive enough and that the benefits to them were not clearly defined.
- Quality issues have on occasion led to conflicts making it harder to engage some (bureaux) strategically (LAN led by CAB).
- Hard to get all partners to comply with the need to evidence spend on the project... every receipt including £1 parking tickets (required by the BLF).
- Difficulties of encroaching in others’ territories (bureaux).
- Some bureaux indicated that they would be interested in working on wider social policy issues which connected with the local LAN work but needed to prioritise social policy campaigns nationally.

The main difficulty stems from limited capacity at the specialist/caseworker level. Four of our members ... have LSC contracts and Council funding to deliver (between them) benefit, debt, housing, employment and immigration advice at Specialist Quality Mark (SQM). But there is simply not enough funding to meet the demand so tensions can arise when a neighbourhood generalist tries to refer a client but the SQM agency cannot accept.

Problems were explored (e.g. in steering group meetings) and often resolved. Occasionally facilitated communication, workshops or mediation and diplomacy were applied. Sometimes a change of management or personnel made the difference. In other cases, “a more structured approach to the project and project management helped”. One LAN spoke of “bringing in clearer systems, applied to all. Agencies are more aware of what each other are doing and how. Active communication plays a key role and “continued joint working helps, as it gets people in the same room.” It is a theme that being clear about remits is essential to positive work in LANs.

## **Key points**

### **Good practice**

- Some LANs managed conflicts by “keeping people in the room”, and so through communication and regular meetings, conflicts could often be resolved, occasionally needing more formal approaches.
- Conflicts were more effectively managed through structured approaches with clearer systems and communication.

### **Challenges**

- LAN conflicts sometimes arose over service arrangements not working out or due to administrative requirements and compliance.
- Quality was an area of work which could cause difficulties.
- Some LANs did not always generate a sense of inclusiveness for particular organisations or communities.

### **Recommendations**

- National bodies and funders can use the findings about the matters that create difficulties in LANs described in this national survey to inform future work.

## 4. Outcomes, benefits and achievements

### What about the original aims, objectives and outcomes of the LANs?

The LANs listed their aims, objectives and outcomes and to do this they were invited to use the original text from their BLF applications. Examined in the context of all the evidence, their responses reveal that:

- LAN aims and objectives varied considerably, while being framed within the overall Advice Plus fund objectives: to increase access and improve quality of advice through partnership and networked organisations and services, with an emphasis on the “client journey”.
- The BLF Advice Plus funding was allocated flexibly. In practice it was allocated to a wide range of networks of differing sizes and make up, with differing aims and objectives, according to the local context, the gaps in local provision and the specific local needs.
- LAN aim and objectives do not appear to correlate in any obvious way with the type of lead body or size of the partnership.

One limitation of the evidence was the differing interpretations of the term ‘outcome’. In some cases LANs listed ‘outputs’ rather than outcomes. The outcomes or differences made/changes were often not expressed in quantitative terms<sup>11</sup>. In any case, the topic could be looked at in more depth, but not here in this report, which is intended to offer timely learning and identify good practice.

Responses about outcomes were however examined for explicit statements about those in greatest need (hard to reach, disadvantaged, poor, rural poor etc.) These are considered below.

The next section examines the delivery of outcomes.

### Key points

#### Good practice

- Cases studies of individual LANs and the use of existing evaluations that LANs have commissioned or undertaken could identify more detail about the good practice in planning, monitoring and reporting.

#### Recommendations

- Funders and national bodies should continue to advise, support and clarify good practice around terminology and expectations in planning, monitoring and reporting against aims, objectives, outputs and outcomes. For the sake of comparison and learning more consensus and better practice is needed.

### What did the LANs say about whether they had attained their outcomes?

Almost 63 per cent (20) of the LANs had or expected to achieve their outcomes.

This includes 50 per cent (16) of the LANs who reported that they achieved all their outcomes, of which five exceeded their outcomes, or targets where they had them. Several had exceeded targets on numbers of clients advised. A further 12.5 per cent (4) indicated that they “mostly” had or would achieve their outcomes by the end of the funding period. Occasionally LANs had to revise and revisit outcomes, take on new partners, or restructure, but got back on track. Examples of all these types of experience follow.

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<sup>11</sup> Big Lottery did significant work on developing guidance for the setting of outcomes at the start of the project and had been rigorous in its checking of project plans detailing outcomes as part of the application process. [www.biglotteryfund.org.uk/prog\\_advice\\_plus](http://www.biglotteryfund.org.uk/prog_advice_plus) for the guidance on outcomes.

**LAN 22** The partnership has posed some challenges, however we have diversified and identified new partners, which have helped to move this forward and enable hard to reach communities access to advice. Clients are being seen more quickly and stress has been evidenced as being reduced. Reduction in need for specialist support has been difficult due to national changes in the economy and welfare benefits which has led to a rise in clients needing support. However there has been some reduction and we expect this to continue. In excess of 1000 additional clients were seen in Year 2 of the project and this continues to rise. Referral system is in place and being utilised effectively.

**LAN 1** The project has established a helpline and a new advice forum. It has provided high quality training (8 training events over 3 years) and quality control file reviews by specialist advisers on those generalist advice providers within the project. It has developed a new advice strategy and has successfully delivered a new way of working that has directly contributed to more local people being able to access the advice and information they need in order to improve their life circumstances. As a result [Area] CAB is now assisting more new clients than any other [Area] Bureau as the [LAN] Helpline now accounts for 50 per cent of all contacts with the service; number of face to face callers to bureaux reduced by between a quarter and a half as a result of ease of access to the Helpline.

**LAN 27** Through our website and marketing, we have raised the profile of the partnership and partner organisations. We have improved access to services through our electronic diary and referral system, RADAR (bespoke) and in opening up our diary to partners, they are able to make their client an appointment there and then at a time and venue that suits the client. That offers the client a seamless service across the city and makes it easier for partners to work together in a timely and professional manner. In terms of our preventative work, we have delivered numerous training sessions to young and disadvantaged people, but we've also raised awareness among front line workers of the issues and how to deal with them at source. This has promoted integration and networking across the [LAN] advice sector.

**LAN 3** The [LAN] now has more members from across the three districts. There is increased access to training, including specialist level training for network members leading to improved quality of advice for service users. The [LAN] took part in the National Quality Mark Pilot and has subsequently developed a range of tools and consultancy support for network members to develop quality standards in house. A range of desk top aids has been produced for members including Where to Go for Advice Booklets, Bookmarks.

Nine (28 per cent) LANs gave information about outcomes not achieved, with some commentary. The most frequently mentioned area here was quality, which applied in five (about 15.5 per cent) of the LANs, and the national context was mentioned.

Have some way to go for the Quality of Advice peer review 'target'. The latter is partly because the original target was ambitious and also because the planned roll out of the WTfA Quality Mark is no longer going ahead - which reduces the incentive for agencies to participate.

Not on target for enabling 45 organisations to maintain, obtain or improve their CLS Quality Mark.

Following discussions with Big Lottery, (organisational Quality Marks) was changed to include PQSSO organisational quality mark. To date no organisations have taken up the free offer!"

There is more about social policy work below.

The changing context was also a theme seen in the examples above, and further LANs could not achieve all their aims “due to changes beyond our control”, or only made “some progress towards these outcomes, against a hugely changeable background”.

Lastly, one LAN explained that they had achieved all of the outcomes defined but had difficulties with accommodation for hosting outreach sessions which was not sufficiently “available or appropriate or fruitful in terms of footfall of clients/new volunteers. This has happened despite the locations being the most deprived areas of the borough.”

## Key points

### Good practice

- The LANs self report a very good success rate in achieving outcomes so their work warrants more study in depth to capture good practice in detail.

### Challenges

- Achieving the quality outcomes was the area of particular concern to the LANs and in the findings of this survey, especially given the aims of BLF Advice Plus. This concern may have been highlighted as of particular importance due to the lack of completion of a nationwide quality framework
- The changing economic and social context challenged several LANs and restricted their achievements.

### Recommendations

- Not very much clear evidence was supplied about meeting the advice needs of those in “greatest need” (who might be also be described as the most disadvantaged or vulnerable). While this may have been influenced by the survey design (there was no explicit question), it is a matter of interest to investigate further.

## What benefit did people who need advice get from the LAN?

### The view from the leads



This question from the survey was designed to identify whether LANs<sup>12</sup> thought that advice service users had gained from the funding of the advice network. Because of the prompts, responses tended to be expressed in terms of advice service activities rather than actual outcomes for the people, but have still been included here<sup>13</sup>.

<sup>12</sup> The baseline here is 31.

<sup>13</sup> There were some issues with interpretation of the question: the report aims to focus on the feedback from where respondents who were able to describe an impact or outcome of their services on their clients’ issues, but some responses were express in terms of activities for example.

It shows that LANs were more successful in bringing benefits to advice service users through changes in referrals than to improvements to quality. LANs also had better evidence in relation to referrals.

Referrals: 48 per cent of the LANs had good data, and 32% had partial data. The rest had none.

Quality: 23 per cent had good data, and 48 per cent had partial data. The rest had none.

LANs also identified "other improvements" which benefited users. The evidence for these was about as strong as that for referrals.

Positive benefits for advice service users as identified by the LANs included:

- more people have been seen more quickly and have accessed the support they needed earlier
- convenient times, less time in waiting rooms and queues
- less distance to travel
- more confidence amongst advice service users
- reduced client stress
- benefits to hospice patients and their families
- hard to reach groups accessed legal advice
- an increase in service availability through the use of trained volunteers and staff, with more clients seen as a result of BLF
- advice given by trained staff (Citizens Advice standard mentioned)
- a broader range of advice
- covering "commonly encountered problems"
- improvements in the quality of advice across the CAB network
- greater access to quality assured information and advice
- increased awareness
- better signposting and information
- more quality assured information and advice
- staff and volunteers using "desk aids".

**LAN 25** Training has resulted in quicker referrals and shorter waiting times: an agreed standard of five working days to complete a referral.

**LAN 1** The project has promoted commonly encountered problems and a large number of front line workers are more aware of these issues when dealing with their service users.

**LAN 23** Hard to reach groups were able to access legal advice at a time when they needed it the most. The project provides form filling support and the majority of our clients require help with form filling. These needs were previously being met partially or not at all. The project supports people in [Area] with all form filling support.

**LAN 10** has significantly improved our data collection...by nurses with regard to welfare benefits advice, e.g. basic form filling. We can now demonstrate the ability of our clinical staff to support clients, and where the issue is more complex we can show that they have referred to the adviser appropriately...We acknowledge that Citizens Advice is the leading organisation in money advice, including benefits, and believe that our patients and families benefit hugely from the wealth of experience and knowledge that they bring ... Our adviser (draws) on other resources within (CAB) such as...expertise in specific areas of finance... (and) regularly receives supervision from (CAB)...The adviser offers regular updates to members of our clinical team on changes to benefits...

## The view from members/partners<sup>14</sup>

There was a range of positive responses from 29 members/partners, which were focused in line with the activities of their respective LANs. One that said it was difficult to assess<sup>15</sup>.

<b>Benefits</b>	<b>Numbers of mentions</b>
<b>Improvement in delivery of services to client</b>	
Better quality advice	3
Employment legal advice, and legal advice	2
Quicker	1
Advice from a specialist	1
Other needs identified	1
<b>Improvement in access to services</b>	
Triage	4
Better referrals, fewer incorrect referrals, easier to refer	3
Better identification of needs, diagnosis	3
Neighbourhood or local delivery (access)	3
One telephone access point (increasing access)	2
Increased access generally	2
More awareness of where to go	2
Signposting	1
Access through kiosks with access to CAB Internet	1

The partnership delivered a seamless advice and support service in a consistent way that was professional, caring and of a quality standard. Clients' needs were assessed by a diagnostic worker and their issues were tackled in an effective manner. Waiting times were reduced and clients spent less time in waiting rooms or long periods of time for appointments.

The [LAN 17] established one phone number for people to access telephone advice services. This service was provided by partner agencies covering phone duty on a rota basis. Previously most if not all agencies struggled to provide adequate cover for this aspect of service delivery, which meant it was often/usually difficult for clients to get through for telephone advice, or having to ring around a variety of agencies, or having to call in person, leading to frustration and dissatisfaction with access to advice. Also the project enabled a good referral mechanism to specialist advice providers who were not involved with the provision of general advice.

Service users and staff are better informed and have greater confidence when dealing with issues and in particular challenging statutory organisation decisions  
People have been able to attend advice giving organisations in their locality at a convenient time, instead of travelling long distances and waiting to be seen by an adviser.

They have been able to resolve their legal issue quickly and effectively through either the diagnostic service or specialist advisors

People in the district have benefited because we are still in neighbourhoods giving them advice, thanks to the network. The three strands of the project ... have all helped us to

<sup>14</sup> This section is based on 30 responses from the second shorter survey for members/partners.

<sup>15</sup> Not in fact from the same LAN or member who was very negative about participation in decision making.

improve the quality of advice given to clients. They have been triaged through a telephone gateway and either given information, an appointment with a general adviser or an appointment with a specialist adviser. This has removed the need to queue outside the CAB and has prioritised need.

## **Key points**

### **Good practice**

- Improved customer experience was a core purpose of the Advice Plus funding and the report identifies and outlines a whole range of changes. More understanding about how the improvements were achieved, how they were measured, and any further impact could be explored through in depth study of individual LANs.

### **Challenges**

- It is not easy in general for advice agencies to gather qualitative or quantitative evidence of benefits to advice service users. One LAN spoke of difficulties conducting a satisfaction survey with clients in terms of obtaining enough returns and sufficient detail about money clients had accessed following advice.

### **Recommendations**

- National bodies and funders could consider offering resources and support with gathering evidence of benefits.

## **What social policy activities and influence did the LANs report?**

Social policy work in the advice sector especially at Citizens Advice traditionally analyses enquiries, identifies trends, and proposes or lobbies for solutions. The LANs led a wide range of activities including analysis of advice work, research and report production, liaison, lobbying, campaigning and responding to consultations. They, with their partners working individually and jointly, convened new groupings, developed new ways of collecting information, and encouraged engagement. They achieved changes across a wide spectrum of policy areas, as can be seen below.

Two thirds of the LANs (21) LANs confirmed that they did social policy work and described their work. Seven LANs did not claim to do social policy work. Two LANs described activities that did not fit the definition of social policy work applied here (e.g. client satisfaction surveys).

Notably LANs clearly did social policy work even when it was not a formal outcome or aim. Social policy outcomes featured in only nine of the LAN lists of original outcomes. Two of these were however quite vague. Only two were quantified although other parts of the survey generated specific and quantified information, see below.

Social policy outcomes created opportunities and challenges. One LAN said, "It is difficult even to establish the metrics, let alone meet the target." Another argued, "It is hard to measure the impact ... on national social policy work".

On the other hand, LAN 21 pointed out, "For many organisations this was their first real experience of social policy work (CABs apart, obviously)". Several LANs were enthusiastic about their contributions to social policy work and strategic approaches to advice.

**LAN 5** The strategic work has gone really well. Advice is recognised as a strategically important activity (one of eight in the [area] according the sustainable community strategy). The profile has been significantly and positively raised with public sector commissioners (and new funding has been identified as a result of this).

The project specification was written before the current government came to power. A lot of the emphasis of the work naturally has changed to protect agencies against cuts locally, which has been largely successful. (No cut was applied to the ring fenced money and grants were offered with a 7% overall cut) and to secure other funding... [LAN] (has been) responding to (a) welter of legislation consultations and briefing locally about impact, as well as organising differently to cope with demand.

**LAN 4** Protection for advice funding budgets from the council and NHS for two years is a significant indicator of success. Via the project manager, we are now routinely invited to participate in strategy groups and consultations (as event organisers, speaker and briefing writers) and other one-off projects. For example, we have lobbied hard for a high level district wide response to the welfare reforms and we were asked to help lead a policy forum event for the council, housing [Area] and NHS, and we have joined a strategic planning group looking at the impact of the reforms, including the localised social fund and council tax benefit.

Several LANs did social policy work drawing on their routine advice work. Joint work between the hospice and their partner the local CAB resulted in a report. Social policy work tended to be linked into the existing social policy work of the lead organisation, especially when it was a CAB, or into the CAB partners where others were leading. This would then involve using the social policy reporting processes of the bureaux. Bureaux were mentioned most often as having an established role and practice in social policy. For instance, LAN 29 reported they had “developed a way of sharing social policy issues... In the main, this has followed the work of Citizens Advice national social policy campaigns and infrastructure. [LAN] has however been successful in raising the awareness of social policy issues of partners.”

Some LANs have established new social policy groups for their areas, and set targets for joint campaigns each year, for example in LAN 15.

**LAN 3** developed two ‘sub’ groups: 1) Peer debt support group and more recently 2) welfare benefit peer support group. Both (...) bring together similar skilled technicians. Together they aim to identify gaps, business pressures and problems through information exchange and sharing good practice.

Work in several LANs (for example in LAN 8) was described as extensive, or presented in detail, for example:

**LAN 32** A report (in) ... four areas of Debt, Employment, Housing and Welfare Benefits. (In relation to Debt on) bailiff action in collecting outstanding council tax, (the) recommendations (were) adopted in full. (Also)... the project team drafted the code of practice for bailiffs contracted for council tax collection.... The Code of Practice will form part of the terms and conditions of the (next) tender process .... (This work has)... been fed into the Ministry of Justice consultation.... The Housing Report on Homelessness and Housing Options identified ...where improvements could be made ...(and the) recommendations ... fed into a major review and restructuring of service delivery with the client as the focal point.

**LAN 4** Led and co-ordinated nine major pieces of social policy work, involving some or all of our network members. Some ... in response to issues identified by local advisers (e.g. difficulties contacting DWP staff and problems with a bailiffs firm employed by the council), others ... in response to government consultations ... while others ... our own initiative (e.g. fuel poverty and protections for pre-payment meter users).

Welfare and legal aid reforms are having a major impact on the advice sector and were mentioned by many LANs:

- Access to Justice Campaign.
- Impact of legal aid cuts.
- Lobbied local MPs on legal aid reform: we have is issue as part of the Justice for All campaign, which “did gain some concessions in the final bill”.
- Lobbied on legal aid reforms and work around welfare reform.
- Collated responses to a number of consultations the DWP ran around welfare reform.
- A welfare reform “conference addressed the concerns of the due changes and the impact raised the profile of the work. (Councillors passed a motion of support; the local paper ran an editorial). It didn’t stop the cuts”.

**LAN 20** is starting to raise awareness on welfare reform in local authorities, advice agencies and the general public...to ensure that the areas of welfare provision that local authorities have responsibility for are well planned and include wide stakeholder views, but also to ensure readiness to accommodate the impact of welfare reform...

**LAN 6** put a social policy tool on their website. “A new group formed as a result of traffic on website drawing up extensive analysis to share with local MPs”.

Many other policy areas were mentioned and dealt with in a variety of ways:

- Problems for clients in their dealings with Job Centre Plus/DWP.
- Delays in receiving housing benefit.
- Gypsies and travellers: discrimination, site provision, illegal sites.
- Assessing the effect of the recession on older people.
- Community charges and tenancy deposit issues.
- ESA work capability assessment: submissions to national consultations. Local council “refusing speak to advisers” ... “got policy changed”.
- Disrepair in private rented sector: carrying out review of council policies, with report planned.
- Housing benefit: outcome was quarterly meetings with benefits and revenues (council) and improved relationship and practice between agencies and department.
- Bailiff action: improved relationship between council and how bailiffs operate.
- Met with Job Centre Plus staff to address issues around the administration of ESA.
- Regular contact with staff from the Pensions Service over a range of issues.
- Single household discount: extensive (draft) report on impact of implementation.

## **Key points**

### **Good practice**

- One LAN succeeded in making advice a key element in their sustainable community strategy.
- Other successful outcomes achieved by LANs in relation to social policy included improved collation of evidence, better relationships with local statutory agencies and subsequent improvements in practice, increased awareness and some political support, and occasional policy changes. The LANs generated some useful experience in joint policy work.
- LANs developed a number of processes to involve groups of members in social policy work: special fora, working groups, social policy tool on websites, forms, joint lobbying, collating responses and evidence, conferences and other events.
- Some LANs protected their advice service budget locally.

### **Recommendations**

- The advice sector could benefit from a comprehensive framework within which to consider process, outcomes and measurement with respect to social policy work. Citizens Advice is a key stakeholder in this because of its social policy evidence collation system and aims.

## How did the LANs summarise their achievements or “successes”?

### The view from the leads

As the opening part of section 4 showed, most LANs said they had met their planned outcomes, several exceeded their targets and some had detailed quantitative information to illustrate their outputs and outcomes. Here the analysis distinguishes outcomes and achievements<sup>16</sup>.

31 LANs reported 96 achievements as displayed in this table.

Access/opening hours/improved service/satisfaction survey	13
“New ways of working”/partnership working/closer working/consortia with honest broker approach	12
Training/Trained advisers	9
Raising the profile of advice/the case for advice	9
Awareness/reputation of advice services of public/statutory/community and voluntary sector	7
Hard to reach/vulnerable/minorities/gypsies and travellers/most deprived wards/outreach/joint events	6
Referral	6
Quality	6
Forums/network meetings	5
Phone system/advice line	4
Common systems/forms	3
Good relationships with local authority	3
Funding/joint bidding/protect agencies	3
Recruit and train volunteers	2
Advice strategy	2
Influencing social policy	2
Campaigning/national campaign partner	2
Prevention	2

The table demonstrates a considerable diversity. Importantly service delivery, new ways of work and training achieve some of the highest scores. It is interesting to note how LAN placed considerable emphasis on their role in raising the profile of advice and the developing a case for advice services. Linked to this was successful work to raise awareness of local services and improve the reputation of advice services across the sector. Together there were 16 mentions of achievements in these areas.

Illustrations of success as reported by the LANs follow.

Highlighting service delivery:

The ability of the project to deliver the training necessary to ensure as wide a range of advisers as possible have up-to-date knowledge and information on the changes brought about by the welfare reform programme. Those things that feed into making the client journey easier such as the referral system.

<sup>16</sup> Outcomes are changes which were planned or unintended and can be negative or positive. Achievements is a wider category and allows the respondent to list elements other than changes. For example specific meetings can be defined as outputs or processes (designed to achieve changes), but are still significant and can be counted as achievements.

A greater understanding of the roles played by the various advisers across the sector. This has led to greater co-operation between advisers dealing with client issues and the decision makers such as the revenue service of the local authority.

Or mentioning voice:

The (...) raised profile of advice services and recognition of their importance at a time of recession, public spending cuts and increasing poverty has been less measurable but very significant. The 'voice' role is one that had not been anticipated but has been effective.

While others focused on prevention:

Promoting financial capabilities to service users and local organisations has been a key success of the project. We believe that over 6,000 people will know and benefit from our preventative work under this project.

A programme of financial capabilities, awareness raising and information provision about illegal money lending targeted at parents of school children, prisoners due for release, students, advice workers and others including the statutory agencies.

Where some LANs struggled with major elements of their project, others were able to implement:

We are particularly pleased to be working with the council to establish a local quality standard that will be recognised by the council.

Common referral system acclaimed and used (although not enough).

It is interesting to note that despite some emphasis on social policy in the descriptions of joint activities there were only two specific mentions of social policy when LANs are asked about 'achievements'. In contrast, achieving changes in relation to advice quality scored relatively well (with six mentions) when they were asked about 'achievement' than might have been expected: in other parts of the survey quality was reported as a less successful area of work (see the next section about where they had done less well for example).

### **Reaching those "in greatest need"**

Between five and seven<sup>17</sup> LANs referred to this target group when asked about outcomes achieved, and six when asked about successes (previous table). From the responses, it would appear that eighteen LANs stated clearly in their planned outcomes that they would seek to make an impact for those in greatest need. As noted already most LANs stated they had achieved their outcomes. Thus, it is not sufficiently clear how well LANs overall were able to deliver outcomes in relation to this target group, nor what evidence could back this.

### **The view from the members/partners**

In general, the responses from partners and members reflected the overall descriptions from the LAN leads about what they had done well, and held no surprises, because LAN leads had reported any issues themselves. One member/partner responded negatively (that only the CAB had benefited).

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<sup>17</sup> In some cases their evidence in the survey, which was understandably brief, was not clear.

LAN members and partners commented on the value of partnership work, for example, bringing “disparate organisations together”, creating a local voice on advice and protecting funding. One respondent said, “The project has exceeded my expectations... We are still funded at the same level as three years ago but we are all still here thanks to the work of the staff at the [LAN] in particular the manager”. Responses also included a reference in one case to being able to offer advice on social welfare, housing and debt related matters for disabled people.

Specific commentary, which shows how member and partners who responded concurred with the overall message from the leads, follows here:

Provided a wide range of services to the community, which is available at any of the key partner agencies offices. It has reached people in the most deprived areas and improved the health of many service users. It has also raised awareness and support through recruitment of wider stakeholders.

[LAN] has provided increased access to advice to those disadvantaged by having little or no access to advice. It has increased the recruitment and training of volunteers. Partnership working between the two bureaux of (two area) showed great success until the closure of (...) Bureau due to funding issues. Sent good quality referrals to our practice. Offered training. Kept me up to date with the project.

Established a joint city wide telephone advice service, with the service provided by a range of partner organisations - productively bringing together CAB and independent agencies. Central coordination of the telephone advice rota and ongoing monitoring of service provision encouraged a culture whereby agencies maintained their commitment (perhaps helped by a sense of ‘healthy rivalry’!) to the benefit of clients.

There has been a good success rate for [us] in dealing with individual cases that were inter-agency referrals, other agencies have clearly identified the services provided and referred accordingly. The client needs are always easily assessed when referred to us and acted on accordingly, with merited individual cases based on urgency and achieving reasonable outcomes.

## **Key points**

### **Good practice**

- Some LANs reported active and evidenced work to reach client groups who were amongst those “most in need”.
- Several LAN identified achievements in new ways to work together and this practice could be captured in more detail, including any training that supports change towards partnership working.

### **Recommendations**

- LAN good practice for groups of advice service clients “most in need” (including minority ethnic groups, disabled people, travellers and gypsies, people in deprived wards, vulnerable people) could be captured in more detail, including how they specified, reached, monitored and reported on work with target groups
- If the purpose of the BLF Round 2 programme was to improve access to and the quality of advice to those most in need, would we expect more LANs to report achievements in these areas? Or does this suggest that this is a challenge that will take more time and more resources, especially in the current social and economic climate where demand is increasing?

## How did the LANs summarise where they had done less well?

### The view from the leads

This question asked the LANs to pinpoint the areas of less progress. Around 40 points were made overall by the lead organisation/respondents, but they are not presented in detail here. The main areas where the majority of LANs identified weaknesses were:

- partnership
- quality development
- referrals
- social policy work.

There were also a number of mentions of funding related matters. Each of these topics had between five and eight examples from across the LANs. There were also single mentions of service delivery (increased advice), recruiting volunteers, good relations with stakeholders, and finally management set up issues, where in that case a lot of project time from the lead organisation had gone instead on set up.

### Partnership relations and processes

Engaging key partners collaboratively could be a challenge even when they were part of the same organisation. Another LAN spoke of needing more time to “create strong links with associate partners”. In some LANs poor attendance by some partners at meetings was a frustration.

**LAN 8** went further: “The project has been less effective in challenging existing silo-working and ‘entrenched’ working practices - however it was not a part of the project to address these issues. More work needs to be done to encourage the wider sector to display greater shared strategic awareness, joined-up working and innovation. This work must be joined up at the national level, with key agencies demonstrating greater synergy on behalf of their members.”

LAN 21 also wanted to achieve more through the partnership on the co-ordination of strategy too. And another LAN explained that the demand for their referral services had concentrated their efforts and not enough time could be devoted to marketing or forward thinking.

Another issue relates to data collection across a partnership: “We have faced significant issues with measuring the impact of our activity as it requires input from frontline agencies who do not necessarily have the systems to provide data that we require, or of they do are not in always able or willing to share it with us<sup>18</sup>.”

**LAN 24** offered further perspective on the nature of partnerships: “Because [the LAN] does not exist as a legal entity in its own right it is difficult to identify exactly what the partnership is; it only succeeds when the partners succeed. It is very much a support and facilitating organisation.”

### Quality

This was another area where several LANs had hoped to achieve more. Quality development and also implementing and embedding quality marks in particular were mentioned. In addition these reflections were offered:

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<sup>18</sup> There is also an issue about getting outcome and longer term impact data from clients who may not be available or willing to provide information that helps advice agencies make the case for their service. This was raised elsewhere with respect to a locally run client survey aiming to get good detail of the actual financial benefit obtained from the advice to demonstrate impact (for funders and evaluation etc.)

We could have set up longer lasting peer review arrangements among our members. While all of them have adopted the Working Together for Advice project (WTfA) standards internally, there are limited inter-agency assessment agreements.

Engaging partners in improving quality standards when there is no requirement or incentive to do so from funders has been our biggest problem. Whilst everyone appreciates the benefits, there's no obvious incentive to put the effort in and everyone complains of time and resource constraints.

We have not met the target of helping 45 organisations to maintain, apply for or improve their Quality Mark. This was because of a change in legislation that did away with the CLS lower level Quality Mark standards.

## Referral

This element, at the heart of the Advice Plus programme, was a challenge and remarked on by six LANs, in one case as "a struggle". Other mentions were slow implementation of an electronic referral system, and interagency referrals. To those points are added these commentaries to illustrate the complexity including the range of issues and stakeholders.

The county council is disappointed the CRS has not taken off in a bigger way. It is not however a signposting tool and therefore (we) expect this to take a long time to be adopted and trusted.

Referral system, not really adopted by agencies: the conflict between a lot of drop in sessions has not helped as agencies seek to populate appointments offered by themselves for themselves.

The partnership struggled with the introduction of the common electronic referral system. Most partners had their own, albeit paper-based, systems and there was resistance to change. That is why the project introduced the simplest system available.

We did not attempt to address inter-agency referrals as our focus was on relationships between advice agencies and statutory organisations. But this issue cannot be avoided now that demand will further exceed supply as legal aid and Money Advice Service Financial Inclusion Funding disappears in 2013<sup>19</sup>.

## Social policy

Social policy work was of concern with respect to engagement and also in relation to producing and evidencing its outcomes. One LAN put it bluntly: "Getting partners within the project to fully understand the nature of social policy work: this was problematical for many, despite the lead partner providing regular training and updates. Partners were very late in providing referral outcome information following referral appointments for advice and the relationship to social policy issues and the financial benefit incurred, notional or actual."

## Finally:

One LAN reported nothing in the way of weakness, another was vague and two referred to failing to get more funding, and the problem of sustaining the work. The latter said that the "high level of investment would create a legacy but levels of service would have to reduce".

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<sup>19</sup> The details of "face 2 face" financial capabilities funding beyond 2013 are not yet known.

Other notable issues raised included:

- A telephone line implementation that was said to have been hampered by the approach of Citizens Advice and individual bureaux to the development of their Adviceline.
- Regret that not able to do more on recognition by the local authority.

### **The view from the members/partners**

The members/partners had relatively little to say about where the LAN had done less well. Of the twelve LANs, there were three LANs where members/partners in effect said 'no failures'. In another case early problems were resolved. A further said the funding was "too short". Some comments related to the context, local and national. For example, "the pressures on funding, particularly the imminent loss of legal aid, has meant that agencies have not been able to build on the work that has been started. This is not a failure of the network but a reflection of the realities of the situation we all find ourselves in."

Members/partners made constructive remarks, which are best understood when matched to their own LAN and context. Suggestions included:

- Partners need better understanding of disability living allowance criteria and of the role of the disability association.
- Could involve more organisations.
- Could offer more training.
- More help with engagement, training and funding of volunteers.
- Could do more on the referral system for the wider network.
- Could improve waiting time.
- Could improve the newsletter.
- Develop joint diary system.
- Develop the telephone access line and promote it to the point of being the preferred route.
- Improve volunteer retention (which is) a challenge in light of the legal aid changes.
- Develop quality mark for organisations (It was "abandoned").

The following comments were also made.

Progress has necessarily been slow, as we have had to work at the pace of the smaller organisations within the network.

It has been difficult to engage the six advocacy support partners within the project. They have all been included in the regular meetings but have not regularly attended. It has been difficult to encourage them to see the positive aspects of the project rather than the administration and paper work required for a referral against the small payment received by them for each referral.

The service has reached an astounding number of people and offered advice and resolution of their problems but the waiting times for advice have at times been higher than we would have liked and this is directly linked to the demand for advice services in the current climate.

For us [specialist centre], it was difficult to engage with clients at the community advice points as we have a central base which enables clients to drop in for information and advice, and it has wide opening times and a helpline, therefore clients can easily access services.

It has been difficult for the project to fully ensure partner agencies did undertake their rota duty. However monitoring of service by the coordinator did prove to be an effective 'reminder' if an agency was not logged on as required. Ultimately the project did sanction one or two agencies who persistently failed to fulfill their duty sessions... this did take time (so) a quicker system to tackle problems could have helped. A major change to how services were delivered

was brought about... a positive impact, but ... it probably came about a bit too late in the life of the project.

It has failed to bring us together. In fact, during the project life the lead partner took over the smaller CAB member and announced that it no longer required our advice services half way through a three year commission that we shared with the two bureaux, (despite being very happy with our work!).

**Key points**

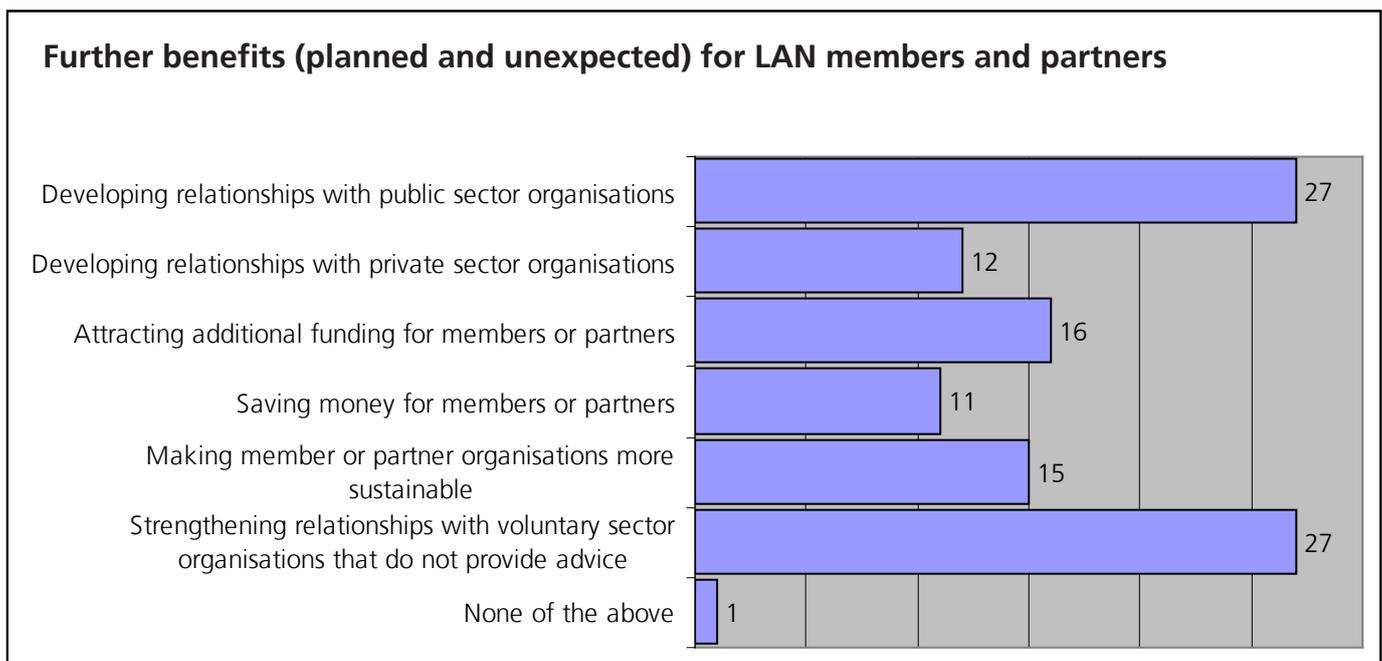
**Challenges**

- There appears to be the potential for conflict between developing LAN wide telephone lines and Citizens Advice AdviceLine
- Some LAN experienced problems setting up common referral systems.

**Recommendations**

- More inquiry is needed to understand how to best devise, introduce, implement and sustain common referral systems.

**What benefits did the LAN bring to network members and partners?**



Working in networks and partnerships can bring unexpected as well as planned for advantages for individual organisations. This chart represents the view of the lead about benefits their partners and members had gained. LAN members and partners were not asked directly on this occasion.

Participating organisations appear to have benefited most from relationship building across the voluntary and statutory sectors. Half the LANs mentioned additional funding and sustainability. About one third benefited from developing relationships with the private sector or saving money.

**Key points**

**Recommendations**

- LANs should in part be fostered because they bring benefits to partner and member organisations in terms of relationships across the sectors and within the community and voluntary sector with non advice giving organisations, as well as financial benefits.

## 5. The positive and negative factors influencing the LAN

### What were the factors for success and for doing less well?

The LANs were asked about the factors that influenced their outcomes, successes and weaker areas. These were the significant themes:

- Funding.
- Partnership.
- The political, financial and economic context.
- People and relationships.

Other factors mentioned included the LAN lead location, delays in statutory agency commissioning, large geographical areas and original bid design in relation to social policy.

The analysis below is headed with “positive” and “negative”.

#### Positive and negative funding

The BLF funding was clearly welcome and fundamental, described as a “catalyst”, and “instrumental”. The BLF was also praised by one LAN for its project support, but criticized by another for their reporting and monitoring mechanisms. LAN 6 mentioned the funds received from the Baring Foundation, which enabled participation by, and training in small organisations.

#### Positive partnerships

LAN leads spoke of the “latent desire and enthusiasm by some of the partnership to improve client experiences”, commitment and goodwill “speeding the project”, as critical. One said there had been ‘few disagreements’. Other comments:

Clear and consistent communication between lead agency, project co-ordinator, partners and network members.

Development of an active local financial inclusion group that all members attend has helped publicise the project, and develop networks, strategic decision making etc.

The project gave us the catalyst to come together in a way that had not happened previously and probably would not have happened had it not been awarded.

#### Negative partnerships

There were no responses by leads to this specific question claiming problems with partnerships were an insurmountable factor, rather it was implied or stated that they could be a limitation.

#### Negative context and climate

The economic context, the new government, withdrawal of funding and the legislation changes were mentioned a few times as challenges or even a “distraction” from service delivery and organisation improvement.

National legislation changes such as welfare reform have impacted upon the number of clients requiring specialist advice.

A greater need for competitiveness amongst partners. Fighting to survive is the current focus of all partners.

Cuts in local funding have impacted on a number of partners' engagement.

The difficult economic climate has been distracting for us all and without this we would have achieved more and been able to concentrate on a future development strategy better.

### **Positive people and relationships**

Strong and dedicated staff (e.g. with "can do attitude"), project managers and volunteers, active teams, and organisational track record managing similar (large) projects, and doing staff development were all mentioned at least once. One LAN mentioned a perverse effect in that more under employed students had led to a rise in young volunteers.

The long established and good working relationships among key individuals within (LAN) members; the opportunity to maintain those relationships through a formal independent partnership, and to integrate new people into an agreed way of working, which promotes partnership and the 'greater good' over individual competition, while recognising the reality of funding competition.

A range of agencies in (this LAN were) all equally resourced, therefore have not been dominated by the wants/needs of a single agency or indeed their reputation.

Able to establish relations with key statutory orgs (via ...multi-agency forums), which gives access to policy makers and strategic planners.

Local authority support: built into advice services contracts that funded agencies have to participate in the (LAN).

### **Positive and negative location**

There were advantages and disadvantages to location with the lead body. One LAN based with the lead, "forged changes via that agency but (that) ... reduced the participation of others." Another LAN argued that being located in its own offices meant it was seen as, "neutral and unaligned and working for the whole membership".

### **Key points**

#### **Good practice**

- LANs have created leverage and improved access to policy makers and strategic planners.

#### **Challenges**

- Funding cuts and the general economic climate have impeded the development of partnerships in many places, with organisations distracted from their main business and partnership work.
- LAN partners/members accessed the Financial Independence Fund, which is coming to a close, one among several radical funding changes for the advice sector. LANs have been well placed to deliver holistic services addressing financial inclusion and capability, which remains an important strategy for addressing need.
- The numbers of people needing advice has risen overall even as the BLF funding was targeted for those most in need.
- The implementation of the LAN lead role was problematic in a few areas.

#### **Recommendations**

- BLF Advice Plus funding has allowed organisations in a locality to work together and has tapped into much commitment, goodwill and capacity to develop joint work for the benefit of people needing advice services.

- Access to other sources of funding seems to be very limited
- Paid and competent staff, lead organisations with track records of managing similar projects, and a history of good relationships in partnerships assist with positive outcomes.

## 6. Sustainability and future priorities

### Have any LANs got money beyond the BLF Advice Plus funding period to sustain their work?

The majority of the LANs did not have funding at all or beyond six months at the most.

Six LANs mentioned Supporting Change Impact Funding (SCIF). Another LAN had £10k to produce a business plan.

Four LANs reported they had money (excluding SCIF) from:

- under spend
- their council for six months
- Big Lottery Reaching Communities for 2.5 years
- RBS (via Citizens Advice): £80k p a for a telephone line.

Several mentioned they were or would be seeking resources. Approaches included:

- Paid for business plan development
- Using a consultant
- Seeing what (they) can do from core services...also use of technology
- "Waiting to see what happens with the Advice Fund"
- "Leading on a BLF Improving Financial Confidence Bid. We will build some co-ordination of the Network into the next council contracts. For example, facilitating the partnership meetings and maintaining website and printed public information."

### **Key points**

#### **Good practice**

- The BLF seems to have been a key source of funding for specific initiatives relating to advice.

#### **Challenges**

- The lack of funding to continue LAN development is a critical matter.

#### **Recommendations**

- It seems unlikely that councils will pick up this funding stream in very many places, and consequently LANs will look to trusts, the Big Lottery and support from the national umbrella bodies for funding and development support.

### Did the LAN lead think the network would be able to sustain itself?

#### **The view from the leads**

Only around 50 per cent of the LANs thought they would be able to sustain beyond 2014.

Some LANs emphasised the need for funding to sustain and others focused on the positive elements achieved that it was hoped the partners and members could continue. At least 18 (56 per cent) LANs were concerned that funded was needed but was unlikely.

Future is very uncertain with loss of funding and national legislation so it is difficult to predict beyond 2014.

Hopefully so, as we have built a strong and supportive partnership but it is difficult to see all aspects of the service being maintained without further funding.

The project is ending at the same time as massive contraction in spending in the public sector. This will make service provision much more challenging while demand increases at the same time.

However in the absence of an identified funding source, the [LAN] partnership representatives are of the view that it will be unable to devote resources to co-ordinate activities in the way that the project team has. It is currently researching innovative ways of continuing the work of the [LAN] but recognises that the co-ordination role is pivotal to its success.

I think there is enough momentum to keep it going for another year through co-ordinated website work, training and information hub development but have my doubts beyond this.

Some LANs were more upbeat saying that the LAN would sustain "in one way or another" and "some elements ... will continue, but not all". A few LANs were hopeful that the Adviceline, online or electronic referral and training were sustainable. Other specific activities that had more chance of continuing were mentioned:

I think it is unlikely that the partnership will survive in this form, as there is no funding readily available to support us on this scale. It is entirely possible that we may find some parts sustainable such as employment advice and we are looking at some other options. The partnership will survive as a [Area] VCS forum of interest but is more likely to become a network, involved in bid support rather than a service delivery mechanism. Unless we win a big bid!

It may run on for a year but without replacement funding it is likely that the momentum will dissipate, as organisations have to focus on their own sustainability. We are trying to move the training onto a self-financing footing and that will be a priority in the final year of the project.

We (Hospice) believe that the model that we have built will attract future funding. We are also looking at the possibility of using volunteers to support the adviser to enable us to extend the service to more people.

Certain aspects such as organisational links, shared training, referral mechanisms etc but the ability to maintain increased capacity for advice will be difficult to sustain.

The network will probably continue as an element in the financial inclusion group.

Lastly, one LAN explained that it needed to become a separate legal entity in order not to have to compete with its own members; it did not favour the lead agency funding model. Local issues about bureaux development had complicated this discussion about the LAN, but non bureaux organisations, "have most to gain from an infrastructure agency like a LAN".

## **The view from the members/partners**

This set of responses was smaller, briefer and more pessimistic. Funding was seen as the chief difficulty. Most of the twelve LANs represented by member/partner responses were not expected to continue in anything like their current form beyond the end of the funding. They focused on the loss of funding, and paid employees who make the LANs effective, and this was largely thought to threaten the survival of the LANs. Losing the LAN was called, “a disaster” and a “great loss”. Another agreed, “this will be a great loss to many services in this area, at a time when demand for advice is already rising and the pace of change is set to increase at an alarming rate – personal independence payment, universal credit, more housing benefit changes etc.”

On a more positive note some LAN members/partners identified elements which they hoped would sustain: outreach, the telephone line run by volunteers, network meetings, the willingness to work together without resources, the commitment and goodwill of partners. Another said hopefully they would continue, “somehow or other”. There was one mention of hoped for local authority support.

## **Key points**

### **Good practice**

- In the context of wind down or transition, a few LANs are trying to sustain particular elements of their work such as employment advice, training, electronic referral, and “the network”.

### **Challenges**

- The co-ordination was identified as pivotal to the success of the LAN but was not considered feasible without funding.

### **Recommendations**

- It is not clear from the survey exactly what will be sustainable across the LANs or how this will be done. There could be a degree of wishful thinking.

## **What priorities did LANs identify for future partnership and network activities?**

### **The view from the leads**

The 31 responses were very diverse and clearly related to the particular circumstances of the LAN. Some LANs answered fairly briefly with one or a few of the following elements:

- Funding to rebuild; joint bids.
- New services.
- Seamless advice.
- Focus on access for hard to reach groups.
- Services for young people and people suffering benefit loss, debt and homelessness.
- Joint delivery strategies linked into local funding, plus use of private funding.
- Designated co-ordinator and co-ordination work; dedicated resources for infrastructure to motivate appropriately; facilitated support and collaboration with an impartial hub that has an overview.
- Maintain and develop links, electronic referral systems, training and quality initiatives.
- More joint development of resources and tools.
- Capacity building.
- Lead agency for delivery of training.
- “Delivering some strategic advances”.
- Social policy, campaigning; responding to the challenges of welfare reform; local responses to the recession and the welfare reform impacts.
- Expand the partnership and improve collaboration.
- Formal consortia to achieve economies of scale and minimise competition for resources.
- Review management arrangements and representation.
- Shared offices for a one stop shop in each major town.

Four responses reflected in some depth:

Different business models, more collaborative approaches for contracts, tenders, grants including bidding and subcontracting. Improving client access, Developing greater and more significant links with non advice providers in VCS and public sectors.

Finding ways to maintain delivery of both generalist and specialist services for social welfare law categories (which is becoming increasingly difficult for specialist services). Developing preventative work services alongside advice such as financial capability, consumer empowerment partnerships and Healthwatch and finding ways to link into local authority strategies such as financial inclusion, child poverty and problem families.

It seems inevitable that demand for advice will increase and massive changes to the welfare system will be implemented while resources for advice services will reduce. That means that advisers will need more training support, tensions between agencies may increase and social policy/profile raising activities will take a back seat. So we will need a project or a worker who is not focused solely/primarily on queue/waiting room and who does not actually and is perceived to have partisan organisational interests. But who will regard that as more important to spend money on than front line advice delivery?

Welfare reform will create unprecedented need amongst advice clients, just as funding is greatly reduced. Furthermore, I am not certain that traditional 'advice' on its own will be able to provide effective solutions for all the people who can access it. We need to think about mitigation and about new ways of developing solutions and building resilience - what is the relationship between the local advice centre and the local food bank for example? How are we developing community champions and peer support?

### **The view from the members/partners**

Asked about future priorities, members/partners' focus depended on their particular experiences, positive and negative, and the services that were under threat. Support, funding and sustainability were explicitly mentioned by at least one respondent from at least ten of the twelve LANs in this sample.

In addition specific client groups and advice areas were mentioned:

- Ethnic specific services.
- Specialist advice, because legal services "were going".
- Young (disabled) people in transition.

Several mentioned continuing, improving or expanding the current LAN activities: with training, volunteer recruitment and training, networking, consultation and communication, progress reporting, support for small organisations, awareness raising, information, strategic work, prevention, advice on funding, all inclusive city wide networks, and co-ordination of social policy.

Priority for LANs in delivering advice services were suggested:

- "Smart use" of resources to maintain frontline services.
- New channels for delivery.
- Convenient face to face access.
- Innovative ways of working.
- Improved telephone services.
- Interagency, "holistic" advice.

## **Key points**

### **Good practice**

- LAN responses reflected a great expertise and understanding of the advice sector, the needs of people for advice services, and the broader political and economic context.

### **Challenges**

- There is a tension between the need to deliver frontline services and the need for dedicated co-ordination so that the sector is more strategic, effective, preventative and innovative.
- Specialist advice will be increasingly needed as legal services reduce.

### **Recommendations**

- The Advice Plus funding has shown that partnerships of advice service organisations and others can create workable structures and cooperate effectively for a more strategic and effective way of delivering frontline advice services, while addressing system issues as well.

## **What support from national advice networks and funders would LANs like to see in the future?**

### **The view from the leads**

Once again there was a very full range of suggestions from many LANs. They are presented here in some detail and form a checklist for funders and national bodies who can ask if the support already exists or whether it should.

Funding (more funding and support to access), partnership development and support, information and best practice sharing were themes.

Quality was mentioned several times in terms of, “an appropriate quality mark for the sector”, advice on “quality accreditation”, a “nationally recognised quality mark”.

[LAN] members locally specifically want financial support in obtaining quality accreditation. Council for Voluntary Services can often (not always) help with accessing PQASSO, (the) quality mark for small organisations, but cannot assist with quality of advice. Could a network of quality co-ordinators/assessors be developed and accessed by network members across the country? For example, we thought about developing a group of properly trained/accredited assessors who would be willing and able to assist with development of quality advice, including assessment of standards and accreditation.

Standardisation of a quality standard across all advice providers that is a pre-requisite of funding applications. Without this being a necessity, there will always be a problem in ensuring a standard and quality service across providers. Support will be required to get all providers to a standard and we now realise that this is beyond the local advice networks.

Streamlined quality assurance structures for smaller agencies which can be adapted locally.

### **The funding and resource related comments:**

- Financial support.
- Money for local co-ordinators; support for local co-ordinators.
- Fund raising and development support.
- Information about funding others are accessing (e.g. transitional funding).
- Advice on sustainability options.
- Seed funding.

- Funding opportunities for further collaboration.
- Lobbying for funding and the continued funding of LANs.
- Quicker information about emerging funding.
- Consultancy support.
- Brief for Association of Charitable Foundations on the need for funding for front line advice.
- More funding for local capacity building and support activities.
- Support for funding local networks.
- Making it a requirement for members to engage.
- Longer term funding.
- Management costs built in to projects because they need a strong lead.

### **Partnership development**

- “National advice networks and funders need to take a lead role in encouraging meaningful partnership working at the local level, showing support for local advice networks and ensuring that future activity goes beyond the ‘usual suspects’ alone.”
- Shared knowledge and templates for successful working.
- Not developing national network tools that don’t work with local partners.
- Sharing good practice and someone to advise nationally on what works/doesn’t work.
- “A much more joined up approach between the membership agencies. How can advice possibly collaborate locally when this is not consistent nationally?”
- Support to develop partnerships with statutory and private organisations.
- Make the case for co-ordination as advice services from third sector and public organisations “appear disjointed”.
- Bureaux to work with local charities for mutual benefit.

### **Information and good practice sharing**

- National network meetings and information sharing.
- Regular policy briefings.
- Best practice workshops and training.
- Support to identify and share the best options for online systems (e.g. for referrals) or for best practices (e.g. triage/gateway) to enable maximum efficiency in service delivery.
- Regional and local based training.
- “More support to share ideas, innovations and developments more easily so that people do not have to reinvent”.
- Online hub where agencies and organisations could post summaries of how they had worked and what they had done or not done, to enable sharing and learning.

### **Social policy work**

- Promoting the value of our services.
- Research and support around impact measurement (making the case for investment in services).
- Develop clarity about the need for specialist advice, the role of volunteers and some organisations. This might be limited to generalist, less complex advice. “We need to push against targets for mass information through telephone systems, when actually what people want at least from our data sets here is to see someone; casework is going up, agencies are seeing more individuals, one off advice is going down”.
- More co-ordinated campaigns.
- Support for local campaigns.

### **The view from the members/partners**

Their positive suggestions about what nationals and funders should do are on the next section. There were however some challenging comments made about the national networks in a local context.

(It is) not a good idea for the advice sector to be seen to be divided...in [area] there is a diverse range of advice and support organisations, a local style network is needed rather than just, for example, Advice UK.

The real issue for local advice networks is sustained funding. National advice networks have had little impact in supporting local advice networks. Their focus is London based they have little awareness of local political conditions. Our survival in [area] is owed to the local advice network who knew where and how to lobby for our future.

## **Key points**

### **Challenges**

- LANs would like support and action in relation to advice service quality, information and good practice sharing, social policy work, funding and partnership development. The areas they have request support with are outlined in the report.
- Funding is a particular challenge and national bodies are expected to help more.
- LANs and local organisations perceive a degree of division between national advice organisations, which they see as unconstructive.

### **Recommendations**

- National bodies and funders can use the suggestions outlined in the report to identify areas for development.

## **How should the support from national bodies be provided?**

### **The view from the leads**

Responses in this section were often rather brief but again relatively diverse, as the lists above would suggest.

In relation to quality, one LAN said, "The partnership is still unsure which way to go. Advice Services Alliance run the Community Legal Service general help quality mark now, Age UK have their own, Citizens Advice have their own. Are these going to be integrated or harmonised? I am still not clear..."

Quality related suggestions for the national organisations were reiterated, for example:

Find a way of making the quality mark more accessible to network members. Can you find a way of developing a national network of quality of advice Assessors - recruited, trained, monitored, etc through a membership scheme and funded by network members. For example if one network member wished to be assessed for quality (and accredited) could a quality coordinator / assessor from either within the network or from another network nationally, be funded to carry out any necessary assessment and accreditation.

More funding was of course also a critical theme.

One suggestion was the development of materials, training, templates and tools, paper, "self help" and web based. It was proposed that toolkits could help with consistency and the measurement of achievements.

In relation to the support needed one LAN said: "Ask for views through a survey". Another responded, "Training, tools and templates should be standardised and formalised at a national

and recognisable level.” Meetings were not universally welcomed because of time and capacity issues, but specific ideas about meetings included, “regional forums and national conventions held nationally, not just in London.” Local face to face meetings, telephone support, consultancy and the existing network (electronic) communication channels, were listed. It was also argued that funding or resourcing to run and participate in these events would be necessary.

### **The view from the members/partners**

The members/partners had as much if not more to say than the lead partners, about the priorities and methods of national organisations and networks, and funders<sup>20</sup>. Their points are dealt with as far as possible under the same topic headings as used in the previous section with the LAN lead responses. There were no clear remarks about social policy here.

### **Quality**

- Support to achieve quality standards.
- Affordable sector led quality mark paid for from subscriptions.
- Lobby for mandatory quality mark for all local authority and PCT funded advice services including in house services for a level playing field.

### **Funding**

- Lobby on funding.
- Support on funding: help/advice lines, training, information online etc.
- Regional funding and practical support.
- Core funding, funding for staff, IT.
- Five year funding, long term funding and no cuts.
- Infrastructure funding.
- Funding pot for local networks.
- Further Advice Plus funding.
- Grants, equipment, consultation.
- Funding for publicity and training.
- Statutory funding and publicity and “feed into ...health and social care”.

### **Partnership and support**

- Small organisations to have links with CAB, Advice UK, the Debtline.
- National networking staff.
- Technical support.
- “Collaboration” with nationals.
- National facilitation of network of local advice and funding initiatives.
- CLSP was a local government performance indicator and it helped with supply, mapping and co-ordination.

### **Information and good practice sharing**

- Good practice support.
- Information about national developments.
- A national and local policy based website.
- Internet network of localised advice and support.
- Message boards on local queries and specific services.

### **Awareness**

- Publicity at national level (about advice) to use local advice services and network.
- Public legal education from school to adulthood to instill awareness of rights and empower.

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<sup>20</sup> Priorities and methods are combined here in a single analysis.

## Key points

### Recommendations

- The significant attention given in the feedback by the LANs to the need for a quality framework supports the continuation of work the national associations have carried out to date on a shared advice sector quality framework and provides evidence of the need for its completion.

## 7. Summary

### 1. Good Practice

See the main body of the report for more detail.

1. Paid co-ordination of the LANs was widespread and considered essential by most LANs in achieving the planned outcomes and creating capacity and potential for development.
2. Clarity about remits was achieved in some LANs through written agreements, and terms of reference.
3. Regular, purposeful meetings, good record keeping and communications enabled transparency, openness and engagement.
4. Some LANs ran consultation processes to achieve buy in and enhance democracy.
5. LAN partners and members appreciated being involved in monitoring partnership delivery, and also being active in tasks like recruitment increased ownership.
6. Most LANs had paid staff; volunteers were only used in a minority of the LANs who responded, so it would appear that paid staff played an important role in the delivery of LAN outcomes.
7. An advice strategy developed or participated in by the LAN offered another mechanism which encouraged clarity and helped organisations work together to a common end.
8. LANs have worked to integrate advice into wider local strategies .
9. LANs appear to have enhanced access to training and created new opportunities for training for a wider range of organisations by opening up existing training or providing customised training or commissioning specialist training from partners.
10. There is some evidence of LANs assisting with strategic, area wide approaches to training on specific benefit changes.
11. LANs have offered training in preventative work (for example on financial capabilities).
12. Individual LANs developed activities jointly which ensured coverage, raised awareness, improved access to appropriate advice, targeted specific groups who were more disadvantaged (or in greatest need), and improved the services of statutory agencies.
13. One major method used by LANs to improve advice quality was training. But there were also other methods like benchmarking, shared standards, indicators, peer review, audits, an outcome based framework on complexity.
14. LANs played an important role through leadership and facilitating a range of activities:
  - Meetings with service users, and with volunteers.
  - Conferences and annual planning for advice agencies.
  - Support for partnerships with statutory agencies.
  - Assisting with local difficulties between or within agencies.
15. LANs have identified a range of ways of delivering more joined up advice services (for advice service users and for advice agencies) through the use of web based and electronic information, communication and systems and there will be considerable in depth experience that could be tapped.
16. Online systems can provide a mechanism for feedback to the referring agency.
17. It is interesting to note the number of different approaches used in LANs to create a more joined up approach and a better experience for the advice service user: common features could be pinpointed through further research and analysis.
18. LAN employed a range of methods and channels to encourage wide engagement and participation, and use a feedback form.
19. Incentives (financial, for instance payments for attending meetings) and tailored support were used to motivate smaller and less well resourced organisations to engage in LANs.

20. Some LANs made strenuous efforts to represent the wider advice sector.
21. LANs suggested the necessity for reviewing the make-up and functioning of the partnership.
22. LANs appeared to appreciate and want to address the barriers to participation (most commonly mentioned as time, funding or finances, resources (staffing levels, for example), followed by capacity and interest/willingness).
23. In relation to competition for funding, there were examples of shared information, openness, brokering, informal and formal agreements, protocols, use of the advice strategy for joint targets, dialogue, cooperation and declarations of interest.
24. Some LANs have shaped and influenced funding strategy, and in one place had to take on board the need for fairness by adopting confidentiality agreements.
25. One LAN succeeded in making advice a key element in their sustainable community strategy.
26. Other successful outcomes achieved by LANs in relation to social policy included improved collation of evidence, better relationships with local statutory agencies and subsequent improvements in practice, increased awareness and some political support, and occasional policy changes. The LANs generated some useful experience in joint policy work.
27. LANs developed a number of processes to involve groups of members in social policy work: special fora, working groups, social policy tool on websites, forms, joint lobbying, collating responses and evidence, conferences and other events.
28. Some LANs protected their advice service budget locally.
29. Some LANs managed conflicts by “keeping people in the room”, and so through communication and regular meetings, conflicts could often be resolved, occasionally needing more formal approaches.
30. Conflicts were more effectively managed through structured approaches with clearer systems and communication.
31. Cases studies of individual LANs and the use of existing evaluations that LANs have commissioned or undertaken could identify more detail about the good practice in planning, monitoring and reporting.
32. The LANs self report a very good success rate in achieving outcomes so their work warrants more study in depth to capture good practice in detail.
33. Improved customer experience was a core purpose of the Advice Plus funding and the report identifies and outlines a whole range of changes. More understanding about how the improvements were achieved, how they were measured, and any further impact could be explored through in depth study of individual LANs.
34. Some LANs reported active and evidenced work to reach client groups who were amongst those “most in need”.
35. Several LAN identified achievements in new ways to work together and this practice could be captured in more detail, including any training that supports change towards partnership working.
36. LANs have created leverage and improved access to policy makers and strategic planners.
37. The BLF seems to have been an key source of funding for specific initiatives relating to advice.
38. In the context of wind down or transition, a few LANs are trying to sustain particular elements of their work such as employment advice, training, electronic referral, and “the network”.
39. LAN responses reflected a great expertise and understanding in the advice sector of the needs of people for advice services, and the broader political and economic context.

## 2. Success factors

The key success factors were:

- Funding for the LAN, which was seen as critical. The BLF funding was an important catalyst for organisations to work together, particularly at a time when funding for the advice sector was being cut.
- Effective partnership working, which often depended on good will, commitment, enthusiasm and good communication.
- Positive, committed staff and managers who are determined to affect change and develop good working relationships with all LAN members.

- Having a strategic approach to both joint working and competition for funding.
- Forming new relationships with the statutory sector.

### 3. Challenges

- The research showed that well worked out structural arrangements, including a body with a formal remit to oversee the LAN, were important to good partnership and smooth operations, but necessarily take time, management, and appropriate resourcing levels.
- LANs were under pressure to deliver outcomes for advice users, so a balance was struck between the imperative to deliver services and meet those targets and activities to enable democracy and discussion.
- LAN partner and member service delivery sometimes had to take priority over strategic development, especially in times of loss of resources.
- Advice related training offered by LANs should be a comprehensive and continuous process, and resourced accordingly, beyond the end of the BLF funding.
- Nationally led changes in legislation and funding created increased need for training by LANs.
- LANs had to balance the different strands of their joint work to deliver or sustain services in a time of decreasing resources but increasing need.
- The lack of a unitary or standardised or comprehensive approach to quality in the advice sectors appears to have been an issue. In particular, the ongoing uncertainty about the future of the General Help Quality Mark (now the Advice Quality Standard) in the social welfare advice sector held LANs back.
- Agencies especially small ones needed sufficient capacity and resources to engage and participate fully in LAN and local joint strategic and operational activities.
- LANs by definition included partners and members with varying capabilities and capacities in terms of IT infrastructure and support and must chose IT systems that suit diverse partners.
- Communication and effective common systems, electronic and otherwise, shared by LAN members and partners were very important to the journey towards seamless services. LANs sometimes had very diverse participants and have had to work in a context of pre-existing systems or plans for systems. It was a considerable challenge to select the right one, get buy in, implement and establish active usage.
- Partnership working is complex and LAN co-ordinators and lead bodies have had to work hard to realise benefits for all partners and members.
- LAN members and partners sometimes made use of one element of the LAN activities but did not contribute or engage with other elements (e.g. quality requirements).
- Most organisations did not have surplus capacity and had to focus on service delivery and meeting targets.
- Partners and members not receiving resources or obvious benefits from a LAN initiative were sometimes less easy to engage.
- The challenge for several LAN was to get all agencies, with or without a share in the LAN's funding, to adopt the vision of a seamless service offering quality advice through a partnership approach.
- Some partners and members did not appear to their lead to have the vision or capacity to address strategic issues.
- Joint work on quality between organisations even in a partnership required trust and openness and this made some organisations feel vulnerable.
- Practical matters like geography, good outreach space and ICT, and staff changes all impacted on inclusion or willingness and ability to engage.
- Involvement by private solicitor firms was sometimes limited by commercial considerations.
- LAN conflicts sometimes arose over service arrangements not working out or due to administrative requirements and compliance.
- Quality was an area of work which could cause difficulties.
- Some LANs did not always generate a sense of inclusiveness for particular organisations or communities.

- There appears to be the potential for conflict between developing LAN wide telephone lines and Citizens Advice AdviceLine.
- Some LAN experienced problems setting up common referral systems.
- Conflict about funding was seen as something to manage; some even argued that they expected to have to compete with others.
- Funding matters did cause some organisations to be more cautious and not collaborate so openly.
- Achieving the quality outcomes was the area of particular concern to the LANs supported by the findings of this survey, especially given the aims of BLF Advice Plus. This concern may have been highlighted as of particular importance due to the lack of completion of a nationwide quality framework.
- The changing economic and social context challenged several LANs and restricted their achievements.
- Funding cuts and the general economic climate have impeded the development of partnerships in many places, with organisations distracted from their main business and partnership work.
- LAN partners/members accessed the Financial Independence Fund, which is coming to a close, one among several radical funding changes for the advice sector. LANs have been well placed to deliver holistic services addressing financial inclusion and capability, which remains an important strategy for addressing need.
- The numbers of people needing advice has risen overall even as the BLF funding was targeted for those most in need.
- It is not easy in general for advice agencies to gather qualitative or quantitative evidence of benefits to advice service users. One LAN spoke of difficulties conducting a satisfaction survey with clients in terms of obtaining enough returns and sufficient detail about money clients had accessed following advice.
- The implementation of the LAN lead role was problematic in a few areas.
- The lack of funding to continue LAN development is a critical matter.
- The co-ordination was identified as pivotal to the success of the LAN but was not considered feasible without funding.
- There is a tension between the need to deliver frontline services and the need for dedicated co-ordination so that the sector is more strategic, effective, preventative and innovative.
- Specialist advice will be increasingly needed as legal services reduce.
- LANs would like support and action in relation to advice service quality, information and good practice sharing, social policy work, funding and partnership development. The areas they have requested support with are outlined in the report.
- Funding is a particular challenge and national bodies are expected to help more. LANs and local organisations would like to be supported by the national advice bodies and see close working between them.

## 4. Recommendations

### A. For Local Advice Networks

#### • Structures

1. LANs are partnerships that require time and effort to nurture, in particular maintaining and exploiting good communications systems is time consuming.
2. LANs took a variety of forms depending on local circumstances and require flexible support and frameworks. The variety of staffing arrangements and the benefits and disadvantages of independent governance and employment structures could be investigated in more depth, as could LAN approaches to and outcomes from social policy work. The research showed that well worked out structural arrangements, including a body with a formal remit to oversee the LAN, were important to good partnership and smooth operations, but necessarily take time, management, and appropriate resourcing levels.
3. There do not seem to be any straightforward conclusions to draw about the size of LAN partnerships or their make up, good practice occurred to some extent across all sizes and configurations of networks.

4. Paid staff with relevant skills and experience, lead organisations with track records of managing similar projects, and a history of good relationships in partnerships assist with positive outcomes.

- **Membership**

5. Partners and members not receiving resources or obvious benefits from a LAN initiative were sometimes less easy to engage and this led to the significant challenge for several LAN to get all agencies, with or without a share in the LAN's funding, to adopt the vision of a seamless service offering quality advice through a partnership approach.
6. LANs should in part be fostered because they bring benefits to partner and member organisations in terms of relationships across the sectors and within the community and voluntary sector with non advice-giving organisations.

- **Activities**

7. There are considerable local area variations in advice services throughout the country so the potential for advice strategies is variable, but LAN advice strategies can attempt to address significant strategic gaps in co-ordination of local authority funded social welfare advice and local social care services. There is probably not a simple template in terms of process or content.
8. A resourced LAN with good governance and membership is potentially well positioned to offer leadership, for example holding strategic and operational meetings relating to a local area or a key advice issue. But this is resource intensive and require good co-ordination, facilitation, and follow-up.
9. There is a very wide range of training that has been developed or could be developed that is essential for the advice sector to be able to provide accessible and quality advice that is up to date and delivered in an effective way. LANs have the potential to increase access to strategically identified training across their areas.
10. LANs have to undertake considerable work to understand referral practice and IT systems before selecting a particular one and this needs more resource. In addition the diversity in organisations and users means that there may never be a common (electronic) system that suits all.
11. LANs could be supported to develop a common approach to data protection.
12. Good common system development in LANs should involve all the stakeholders especially those on the front line who refer clients and will use the common approaches on a daily basis, as well as service managers.
13. Particular groups of (potentially "in most need" or under represented) advice service users (for instance, gypsies and travellers) with specific access and quality issues should be explicitly named in work plans and strategies. Furthermore, LAN good practice for groups of advice service clients "most in need" (including minority ethnic groups, disabled people, travellers and gypsies, people in deprived wards, vulnerable people) could be captured in more detail, including how they specified, reached, monitored and reported on work with target groups.
14. LANs can create leverage and improved access to policy makers and strategic planners.

- **Quality**

15. Better understanding and definitions of what is meant by advice should underpin advice services and LAN approaches. Advice varies in terms of advice area/topic and level of support offered (self help, one off advice, casework, representation, specialist etc). The type of advice should address the needs of particular client groups, the level of demand, and ease of access.
16. There is clear appetite from LANs for a nationally-recognised quality standard that audits the quality of advice. LANs' efforts to address quality could offer a source of evidence for any future work on quality.
17. Any increased dependence on the use of volunteers to give advice in the advice sector brings with it the need to increase quality control and provide support and training.

## • **Funding**

18. Investment so far in the LANs and their development will be undermined without new or alternative funding beyond the end of Advice Plus.
19. LANs may need more support and resources to make effective use of communications technology and social media to improve partnership working as well as public awareness.
20. Funding is clearly recognised as a contentious area and is best managed through openness, agreed processes and structures which aim to minimise issues, avoid destructive competition and maintain good relations.
21. There is still a need for resources for delivery of advice by telephone and email in LANs.

## • **Further research**

22. Online discussions for LANs offered in a few topic areas could be a method to establish. It would also be instructive to create individual LAN stories or case studies, and make further comparisons about joint work.
23. More work is needed to understand how to best devise, introduce, implement and sustain common referral systems.
24. It would be valuable to know more about the marketing of LAN websites, and feedback from the public. Further questions could be asked about user figures and usage (which functions, which pages) generally.

## **B. For National Advice Organisations (NAOs)**

1. NAOs could encourage LANs to be clearer about roles and remits regarding management, operations, strategy and participation in decision making, by providing decision-making models, typologies, definitions, frameworks and case studies.
2. The range of practices that have been developed by LANs could be captured in more detail and depth and shared. Topics could include their role in training, user participation, stakeholder participation, liaison, local advice strategies, quality control, convening special focus groups, networking and social policy work. This could be carried out via online sharing and collation.
3. NAOs could consider whether a national body affiliation could be useful and available to new, separate and legally constituted LANs.
4. The significant attention given in the feedback by the LANs to the need for a quality framework supports the continuation of work the NAOs have carried out to date on a shared advice sector quality framework and provides evidence of the need for its completion. The lack of a unitary or standardised or comprehensive approach to quality in the advice sectors appears to have been an issue. In particular, the ongoing uncertainty about the future of the General Help Quality Mark (now the Advice Quality Standard) in the social welfare advice sector held LANs back. LANs looked for leadership in relation to this area, finding it difficult. Joint work on quality between organizations, even in a partnership, required trust and openness and this made some organisations feel vulnerable to scrutiny.
5. NAOs could consider whether there is a need to promote more actively the value of partnership working among their members. As many bureaux were the lead organisations, Citizens Advice may want to explore questions about capacity and lack of strategic skills in some bureaux.
6. The advice sector could benefit from a comprehensive framework within which to consider process, outcomes and measurement with respect to social policy work. Citizens Advice is a key stakeholder in this because of its social policy evidence collation system and aims.

## **C. Funding**

1. Access to other sources of funding seems to be very limited and it seems unlikely that Local Authorities will pick up this funding stream in many places. Consequently LANs will look to Trusts, the Big Lottery and support from the national umbrella bodies for funding and development support.
2. While it is unclear from the survey exactly what will be sustainable across the LANs or how this will be done, the Advice Plus funding has shown that partnerships of advice service organisations and

others can create workable structures and cooperate effectively for a more strategic and effective way of delivering frontline advice services, while also addressing system issues.

## **8. Acknowledgements**

Citizens Advice, The Law Centres Federation and Advice UK would like to thank all the LAN leads and member/partner organisations that helped in the development of, or responded to the survey for their time and effort.

## 9. Appendices

1. List of all lead respondents, and their LAN contact details, where permission given
2. List of member/partner respondents
3. Surveys
4. Table of LANs

## 1. List of all lead respondents, and their LAN contact details, where permission given

<b>Partnerships</b>	<b>Main contact name</b>
<b>Advice Plus Round 1</b>	
Age UK Warwickshire	Sally Elliot
Isabel Hospice Limited	Charity Warnes
Age UK Bexley	Paul Goulden
West Oxfordshire Citizens Advice Bureau	Barbara Shaw
Elderly Accommodation Counsel	John Galvin
Voluntary Action Rotherham	Maxine Phillips
Oxfordshire Mind	David Bryceland
Women in Prison	Rachel Halford
Advice Services Alliance	Richard Jenner
South and West Leicestershire CAB	Richard Evans
Tower Hamlets Law Centre (Tower Hamlets Community Advice Network)	Sue Brown
<b>Advice Plus Round 2</b>	
Citizens Advice Shropshire	Alan Jenkins
Citizens Advice Trafford	Dale Maskell
Stoke On Trent Citizens Advice Bureaux	Simon Harris
Nucleus Earls Court Community Action Ltd	Baljit Badesha
Taunton And District Citizens Advice Bureau	Liz Fothergill
Middlesbrough Citizens Advice Bureau	John Daniels
Norfolk Community Law Service Limited	Ros Brown
Leeds Citizens Advice Bureau	Susan Wood
Cheshire West CAB Limited	Liz Dickinson
Manchester Citizens Advice Bureaux Service	Prue Yeoman
Mansfield and District Citizens Advice Bureau	Darran Trute
Doncaster Citizens Advice Bureau	Matthew Bennie
Walsall Citizens Advice Bureau	Claire Foulkes
West Devon Citizens Advice Bureau	Mandy Kenyon
Citizens Advice Hampshire	Helen Corkery
North East Derbyshire Citizens Advice Bureau	Kris Ambler
Advice Network & Training Partnership (Bradford and District)	Nick Hodgkinson
Avon and Bristol Law Centre	Clare Carter
Advice Network (Bristol)	Jane Emanuel
Southwark Citizens Advice Bureaux Service	Sally Causer
Barnet Citizens Advice Bureau	Debrina Lloyd-Davies
Bedworth, Rugby and Nuneaton Citizens Advice Bureau	David Gooding
Wiltshire Citizens Advice	Kate Brooks
Liverpool Specialist Advice Services	Paul Sumpter
Blackpool Citizens Advice Bureau	Marie Blackshaw

Enfield Disability Action	Dennis Spitz
Citizens Advice Sunderland	Irene Smith
Peterborough Citizens Advice Bureau	Keith Jones
Luton Rights	Rumi Chowdhury
Northampton & District Citizens Advice Bureau	Martin Lord
Advice Partnership for East Kent	Andy Ball
Bath and District Citizens Advice Bureau	Kevin Jordan
Barking And Dagenham Citizens Advice Bureau	Pip Salvador-Jones
South West London Law Centres	Patrick Marples
Rochdale and District Citizens Advice Bureau	Sumera Hussain
Cambridge And District Citizens Advice Bureau	Kulbir Singh
Darlington Citizens Advice Bureau	Neeraj Sharma
Citizens Advice Cumbria	Martin Telford
Citizens Advice East Sussex	Julie Eason
Brighton Housing Trust	Paul Sweeting

## 2a. List of leader respondents

<b>Main contact</b>	<b>Lead organisation</b>	<b>Name of LAN</b>
David Gooding	Bedworth Rugby & Nuneaton CAB (BRANCAB)	Legal Advice Warwickshire
Carl Rice	Walsall CAB	Walsall Advice Hub
Neeraj Sharma	Darlington CAB	Community Advice Partnership
Helen Corkery	Citizens Advice Hampshire	Hampshire Advice Plus
Paul Sweeting	BHT (on behalf of Brighton and Hove Advice Partnership)	Brighton and Hove Advice Strategy Period
Julie Eason	East Sussex Advice Plus (ESAP)	East Sussex Advice Plus
Barbara Shaw	WOCAB	Community Engagement for Gysies and Travellers
Susan Wood	Advice Leeds	Advice Leeds
Nick Hodgkinson	Advice Network & Training Partnership (Bradford District)	Achieving Quality Advice project, owned by the Advice Network & Training Partnership (Bradford District)
Alan Jenkins	Citizens Advice Shropshire	CLASP (Community Legal Advice Service Project)
Andy Ball	Advice Partnership for East Kent	Advice Partnership for East Kent (APEK)
Marie Blackshaw	Blackpool CAB	Accessible Advice Service / Fylde Coast Advice Network
Debrina LLOYD-Davies	Barnet Citizens Advice Bureau	Advice Barnet Project
Kris Ambler	Advice Derbyshire	Advice Derbyshire Access to Advice Project
Sumera Hussain	Rochdale Legal Advice Partnership	Rochdale Legal Advice Partnership
Jane Emanuel	Advice Network, Bristol, South Gloucestershire and North Somerset	Advice Network (Bristol, South Glos, North Somerset)
Irene Smith MBE	Citizens Advice Sunderland	Sunderland Advice Partnership
Mr Dennis Spitz	Enfield Disability Action	Enfield Advice Plus Partnership (EAPP)
Dale Maskell	Citizens Advice Trafford	Trafford Advice Partnership: Access for All
Simon Harris	Stoke-on-Trent CAB	North Staffordshire Advice Network
Kevin Jordan	CAB – Bath & North East Somerset	Bath & District Advice Consortium: Access Quality and Effectiveness project
Adam Clark	Norfolk Community Law Service	Norfolk Community Advice Network (NCAN)
Charity Warnes	Isabel Hospice	Welfare Benefits and Financial Advice Service
Liz Fothergill	Taunton CAB	Somerset Advice Network
Paul Sumpter	Liverpool Specialist Advice Services	Liverpool Advice Alliance
John Daniels	Middlesbrough CAB	Middlesbrough Advice Partnership
Keith Holder	Wiltshire Advice Partnership	Wiltshire Advice Partnership
Amy Monk	Peterborough Citizens Advice Bureau	Peterborough Advice Integration Project
Sally Causer	Southwark CAB	Southwark Legal Advice Network
Prue Yeoman	Manchester Citizens Advice Bureau Services	One Stop Advice

Matthew Bennie	Doncaster CAB	Doncaster Advice Services Partnership [DASP]
Liz Dickinson	Cheshire West Citizens Advice	Cheshire Advice Partnership

## 2b. List of partner respondents

<b>Main contact</b>	<b>Lead organisation</b>	<b>LAN</b>
Stephen	DabB	Advice Barnet Project participants: DabB, CAB, Barnet Voice, Barnet People's Choice, Mind in Barnet and IAB
Mr Avinash Mandalia	Sangam Association of Asian Women	Advice Barnet Project
Ele Wolstenholme	M25 Housing and Support Group	Doncaster Advice Services Partnership
Lindsey Williams	A4U	CLASP
Peter Arch	Rural Cambs CAB	Cambridgeshire Advice Hub Project
Lesley Scally	WECIL Ltd	Advice Centres for Avon
Syar Taher	Barnet Refugee Service	Advice Barnet Project
Andy Gillett	Blackpool CAB	Accessible Advice Services Project
Lynette Kirk	Manningham Project	Achieving Quality Advice – Advice Network & Training Partnership Bradford West Yorkshire
Annabel Boyce	OSCA	CLASP
Peter Arch	Rural Cambs CAB	Cambridgeshire Advice Hub Project
Paul Sowerbutts	SSP Law	Advice Barnet Project
Ruth Frost	Welfare Rights and Money Advice Service, Bristol CC	The Advice Network – Bristol & District
Marilyn Sparrow	Barnet Law Service	Barnet CAB Advice Barnet Project
Allan Brown	Enfield Mencap	Enfield Advice Plus Network
Pam Cochrane	Advice Link	Fylde Coast Advice Network
Kim Cook	Fylde Citizens Advice Bureau	Fylde Coast Advicelink
Kelly Hunter	Trafford Carers Centre	Trafford Advice Partnership
Sarah Williams	SWAN Advice Network	Bath and District Advice Consortium
Pamela Arrand	DIAL Doncaster	Doncaster Advice Service Partnership (DASP)
Anne Richards	North Somerset CAB	Bristol, North Somerset and South Gloucestershire Advice Network
Janet Ward	Liverpool Central CAB	Liverpool Advice Alliance
Michael Mealing	Huntingdonshire CAB	Cambridgeshire Advice Hub
Siw Jones	North Liverpool CAB	Liverpool Advice Alliance
Peggy Kelly	Merseyside Welfare Rights	Liverpool Advice Alliance
Tony Mohammad	Shire Advice Service	Bristol Advice Network
David Kane	Age UK Salisbury District	Wiltshire Advice Partnership
Sally Gapper	North Bristol Advice Centre	Advice Network Bristol
Helena Peake	South West Law	Advice Network, Bristol
Lisa Burnett	Royds Advice Service	Advice Network and Training Partnership (Bradford)

### 3a. Local advice network leads survey

Through the Advice Plus programme, the Big Lottery Fund supported a number of local projects to work in partnership with others, with the aim of helping people to access good quality advice. With the agreement of the Big Lottery Fund, Citizens Advice, the Law Centres Federation and AdviceUK are working together to undertake a national survey of Advice Plus projects. This will give us a better understanding of the outcomes and impact of multiagency advice networks.

Anonymised survey results will be made available to local advice networks and national membership organisations, with the aim of creating an information resource and evidence base that can be used by those coordinating, supporting and funding local advice networks in the future. With your permission, we will share your contact details with other voluntary sector advice organisations.

This survey is designed to be completed by organisations that have led Advice Plus projects and networks (there is a separate survey for organisations involved as project partners or network members).

Thank you very much for your help.

1. Please give us your contact details.

- Name
- Organisation
- Contact email
- Phone number
- Website

2. Are you happy for us to share your contact details with other voluntary sector advice organisations and networks?

- Yes
- No
- With the following restrictions

#### **Basic project information**

3. Please give us the name of the Advice Plus project or network that your organisation has led / coordinated.

4. How much funding did you get from the Big Lottery Fund and for what period?

5. Did you secure any other funding for the project / network (from where, how much, what for and over what period)?

#### **The partnership and its operation**

6. Was there a network established before the start of the Advice Plus project? If there was, when did it start operating?

7. Please describe the geographical area covered by your network or project.

8. Please list the organisations that are project partners or network members.

9. For project partners and network members that are voluntary sector organisations, what national advice networks are they affiliated to? Please tick all that apply.

- AdviceUK
- Age UK

- Citizens Advice
- Law Centres Federation
- Shelter
- Youth Access
- Other (please give details)

10. Please describe the kind of meetings the project / network has held, their frequency, and typical numbers attending these meetings.

11. Apart from faceto face meetings, what other ways of communicating with members or partners are used? Please tick all that apply.

- Email
- Newsletter
- Website of lead organisation
- Dedicated website for project or network
- Website with shared space to which partners or members can contribute
- Social media such as Facebook, Twitter, wiki
- Other (please give details)

12. Have project partners or network members worked together to develop any of the following? Please tick all that apply, and give details of any specific initiatives.

- Service delivery
- Funding applications
- Referral arrangements
- Training and workforce development
- Social policy work (for example, responding to consultations, writing reports)
- Campaigning (for example, holding public events, lobbying decision makers)
- Purchasing
- Influencing funders and commissioners
- Advice strategies
- Monitoring and evaluation
- Other (please give details)
- Specific initiatives (please give details)

13. Do you have a dedicated website for the network or project?

- Yes
- No
- Brief description of what website does

14. Do you have an electronic referral system?

- Yes
- No
- Brief description of electronic referral system

15. Does the network or project have common systems (used by 3 or more organisations) for referring people? If so, please briefly outline your specific referral system.

16. Following on from the last question, please tick all the responses that describe your situation.

- Online referral system
- Shared protocol for referring by phone
- Shared protocol for referring by fax or letter
- Shared protocol for referring by email
- Feedback on referral quality

- Other (please give details)
- Details and comments

### **Leadership and management**

17. How are decisions made about the strategic direction of the network or project?

18. How does the lead organisation for the network or project involve the members or partners in decision making? Please describe any mechanisms in place to give transparency and accountability, such as a steering group.

19. How are decisions about project or network activities implemented? Please indicate if the network or project employs paid staff or uses volunteers.

20. Did the network or project develop either or both of the following? Please give brief details.

- A specific advice strategy for the area covered by your network? Yes / No
- New training for project or network members? Yes / No
- Please give brief details.

### **Issues**

21. Are there organisations that were not able to participate in the network or project as you would have liked or expected? Please give further details. If you are able to, please group organisations by how much they participated in the project or network (fully / partly / hardly / never).

Please note that ALL responses to this question will be treated as confidential and will not be shared outside AdviceUK, Citizens Advice or the Law Centres Federation, and specifically not with the organisations concerned.

22. What do you think are the main barriers to members and partners getting involved in the network or project?

23. Have there been conflicts between network members or project partners competing for funding? If so, how have they been resolved?

24. Have there been other difficulties between members or partners? If so, how have they been resolved?

### **Changes and outcomes**

25. What were the stated aims and objectives of the network or project? You can refer to any written aims and objectives (for example, those outlined in the Project Summary and Project Beneficiaries sections of your Advice Plus application, those outlined in other funding applications, and any written aims and objectives developed over the course of the project).

26. What specific outcomes or changes did the network or project want to achieve? Again, you can refer to the Project Outcomes section in your original Advice Plus application, or outcomes referred to in other funding applications.

27. To what extent has the work of the project or network achieved these outcomes?

28. How have people that need advice benefited from the project or network? Please select the options from the drop down menus that best describe your situation.

- Specific improvements in referrals Was there a benefit?  
Do you have data to evidence this?

- Improvements in the quality of advice                      Was there a benefit?  
Do you have data to evidence this?
- Other improvements (please give details)                      Was there a benefit?  
Do you have data to evidence this?
- Further details or comments

29. Has the project or network undertaken any social policy work? If so, what are the key areas that you have worked on and what are the outcomes to date of that work.

30. How would you describe the key successes of the network or project?

31. In your opinion, what has the project or network done less well, or failed to do?

32. Have any other factors, apart from the Advice Plus funding, been key to the success or failure of the project or network in meeting its aims and objectives? Please outline.

33. Have network members or project partners benefited in any of the following ways because of the work? Please tick all that apply and add any others that you have identified (including unexpected benefits).

- Developing relationships with public sector organisations
- Developing relationships with private sector organisations
- Attracting additional funding for members or partners
- Saving money for members or partners
- Making member or partner organisations more sustainable
- Strengthening relationships with voluntary sector organisations that don't provide advice
- None of the above
- Other benefits and comments

### **Exit strategy and the future**

34. Have you got any funding to support project activities beyond the period funded by Advice Plus? If so, please describe this funding briefly (where from, how much, what for, and over what period)

35. In your view, will the network or project be able to sustain itself? Please indicate Yes/No

- Into 2013-2014?
- Beyond 2014?
- Comments

36. What do you think should be the priorities for future partnership and network activities?

37. What support for LOCAL advice networks and projects would you like to see from NATIONAL advice networks and funders in the future?

38. How should this support be provided?

39. Thank you very much for your time completing the survey. If you wish to make any other comments related to the issues raised above, please do so here.

### 3b. Local advice network partners survey

Through the Advice Plus programme, the Big Lottery Fund supported a number of local projects to work in partnership with others, with the aim of helping people to access good quality advice.

With the agreement of the Big Lottery Fund, Citizens Advice, the Law Centres Federation and AdviceUK are working together to undertake a national survey of Advice Plus projects. This will give us a better understanding of the outcomes and impact of multiagency advice networks.

Anonymised survey results will be made available to local advice networks and national membership organisations, with the aim of creating an information resource and evidence base that can be used by those coordinating, supporting and funding local advice networks in the future.

This survey is designed to be completed by organisations involved in Advice Plus projects as partners (not as lead organisations). It should take no more than 10 minutes to complete, and is best answered by the person in your organisation who was most involved with the Advice Plus network or project.

Thank you very much for your help.

1. Please give us your contact details.

- Name
- Organisation
- Contact email
- Phone number
- Website

2. Please give us the name of the Advice Plus project or network in which your organisation is, or has been, involved.

3. In your opinion, what has the project or network done well?

4. How have people that need advice benefited from the project or network?

5. Have you been helped to participate in the project or network by the ways in which it has been managed? In particular, have you been able to contribute to decision making? Please briefly explain.

6. In your opinion, what has the project or network done less well, or failed to do?

7. In your view, will the network or project be able to sustain itself?

- Into 2013-2014            Yes / No
- Beyond 2014            Yes / No
- Comments

8. What do you think should be the priorities for future partnership and network activities?

9. What support for LOCAL advice networks and projects would you like to see from NATIONAL advice networks and funders in the future?

10. How should this support be provided?

11. Thank you very much for your time completing the survey. If you wish to make any other comments related to the issues raised above, please do so here.

#### 4. Table of LANs

LAN	Locale	Partner	Other organisations described as "members"	Core or Steering Group	Strategic decisions	Lead	Staff	Involve members	Further details on structure / membership where mentioned	Average annual main BLF grant (based on information supplied)
1		18			Partner meetings	CAB	✓	Partner meetings		£166k
2		6	+ 5	✓	None since business plan	CAB	✓	Various including SG		£92k
3		7	100s		Through local community advice strategy group	CAB	✓	Sometimes network members	Partnership management board	£129k
4		"All the CLS QM centres" + others (assume 11-20)	32		Board in consultation with wider membership	None	✓	Staff work to support all members	Trustee board >12; Some elected, by full members	£125k
5		24			Advice Partnership in consultation				Independent Partnership But hosted	£114k
6		21		7	Steering group		✓	Advice Centres for [area] meetings		£105k
7		5		✓	Steering group	CAB	✓	Via the steering group		£197k

8	17-20		7	Steering group	CAB	√	Partnership Agreement		£116k
9	3	"Several"		Partnership meetings	CAB		Partnership meetings		£153k
10	2			Two way meetings		√	n/a	Organisation + CAB (2)	£19k
11	113			Trustee Board	CAB	√	Partners forum	Independent organisation	£100k
12	6 (5 CAB)		√	Steering group	CAB	Steering group			£166k
13	16	+32		Partners		√			£125k
14	3	+ a wider network	√	Ops comm. and steering group	CAB	√	Terms of reference for committees		£120k
15	3	60	√	Steering group	CAB	√	Steering group and survey monkey discussion forum		£99k
16	11 = full members	+13 assoc. + 5 affils	5	Steering group and partnership meetings	CAB	√	Steering group and partnership meetings	Note membership arrangements	£100k
17	13		6	Steering group		√	Partnership group		£167k
18	19			Project advisory board + CE		√	Project advisory board		£150k
19	6			Quarterly management meetings	CAB	√	Management meetings		£96k

20	10	40	✓	Steering group		✓	Steering group and group with 'wider strategic partnership'	Other members not listed	£56k
21	3	29	(✓)	Project Board of partners	CAB	✓	Consultation about training; steering group = practitioners group		£125k
22	4/5			Partnership board	CAB	✓	Partnership/lead		£118k
23	16			Board and partnership		✓	Board and partnership minutes		£111k
24	4	6	✓	Steering group	CAB	✓	All partners invited to steering group	The 6 can refer and be paid advocates	£160k
25	10	4 named and numerous members	✓(14)	Steering group (main partners)	CAB	✓	SG chaired by Chair of Trustees of CAB lead		unclear
26	10	Wider group		Partners meetings	CAB		Partnership meetings + ad hoc working groups	Wider group involved	£150k but unclear

27	8		5	Staff team. Lead offers resources to partners. Focus groups.	CAB	√	Staff deliver activities, and in response to requests from partners	£156k
28	4		√	All partners at steering group	CAB	√	All partners at steering group	£500k total for period?
29	4 "funded"	4 "unfunded"		Partnership meetings	CAB	√	Partnership meetings	£327k total period?
30	26			By lead organisation after discussion with partners	CAB	√	The Network is the method.	£98k
31	11		√	Steering committee +subs	CAB	√	Through steering group	£163k
32	9			Partnership meetings	CAB	√	Partnership meetings	£134k