Dorset Advice Strategy | 2016-2021

Produced for Dorset County Council
by Citizens Advice in Dorset

SEPTEMBER 2015
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In March 2015 Dorset County Council commissioned Citizens Advice in Dorset (CAiD) to prepare an Advice Strategy. This needed to explore national factors such as the continuing impact of austerity and the increasing demand for advice, setting these alongside local needs and environment. The focus is Social Welfare Law (SWL) defined as those areas of civil law with which people on low incomes, who are typically disadvantaged, are prone to experience difficulties. The main areas involved are debt, welfare benefits, housing and employment; additional areas include discrimination, education, community care, immigration and mental health.

Dorset County Council had already embarked on work to understand and bring together a range of services both statutory, not-for-profit and voluntary through the ‘Joining the Dots’ and ‘Forward Together’ pan Dorset initiatives. The fragmented nature of the advice sector became increasingly apparent and concerns were expressed about the need for better joining up to avoid duplication and sustain services for a growing population with advice needs. It was agreed that a strategy was required. Improved working together and being ‘ambitious and creative in the way we map our future’ are ambitions reflected in the Corporate Plan 2015 – 2018 for Dorset.

Alongside these things was the need to understand the issues and opportunities presented by ‘pan-Dorset’ initiatives and programmes by taking account of the views from Bournemouth and Poole; given recent announcements about the potential development of a ‘super-council’ this wider view is particularly pertinent.

Learning from the Low Commission (2015) has further emphasised the vital role of early intervention, collaborative working, and co-design and co-production within commissioning processes, enabling services to better meet client need and address preventable demand.

Citizens Advice in Dorset is a consortium of the nine Citizens Advice Bureaux based in Dorset, Bournemouth and Poole. Its aim is to ensure that the people of Dorset, Bournemouth and Poole have access to the best possible advice services by promoting the work of the Citizens Advice Bureaux, and by supporting the development and growth of the service. CAiD has a good understanding of, and working relationships with, the wider advice sector both through long-established links between local offices and other agencies, and more recently through a Lottery funded project, ‘Connecting Advice in Dorset’. This meant CAiD was well placed to investigate and analyse current advice provision, and make recommendations for the way ahead. An independent, local consultant Sara Armstrong was commissioned to consult with a range of providers and CAiD Trustees to develop this strategy.

Throughout this process we have kept sight of a clear and simple vision that we hope results from this work:

*To build a strong advice sector in Dorset that works together to ensure that quality advice and support are available at the right time and in the right place, and that services are delivered in a way that best meets a person’s need.*
Executive Summary

Dorset County Council (DCC) has recognised the need for a clear advice strategy with a delivery mechanism to meet the likely demands for advice for Dorset residents over the period 2016-2021 and to take account of the potential for closer working with the Councils in Bournemouth and Poole. To help develop and test this strategy Citizens Advice in Dorset (CAiD) was commissioned by DCC to consult with stakeholders, review findings and propose recommendations to commissioners and elected members in order to create the optimum structure, support the design of sustainable funding envelopes and subsequently deliver real outcomes for advice organisations and Dorset residents.

The following key objectives were identified from the research:

► To maximise the number of clients helped
► To maximise client satisfaction with the outcome
► To maximise ratio of quality of outcome to resource used
► To maximise ease of access to advice though breadth of access locations and channels
► To minimise client confusion as to where to source appropriate help
► To minimise crisis situations though early intervention
► To minimise waste of resource and maximise existing assets and specialisms
► To minimise duplication

As pressures on public finances continue, policymakers will need to maximise the provision of early high quality advice and support to those in need, which delivers optimum outcomes both for the individuals needing help, and reduces the need and cost of crisis intervention at a later stage. Quality advice for citizens is no longer “nice to have” – it is “must have” and it needs to be delivered in a more joined up and cost effective way. Demand for advice services is already high and it is set to significantly increase over the next 5 years.

“Advice” can be defined to include a wide spectrum of types of support, all important, but different. We believe that a successful strategy will bring together diverse specialist advice and support in a co-ordinated and focused manner. This will enable us to better respond to the challenges ahead, such as those presented by welfare reform, reductions to legal aid and the Care Act; whilst still meeting the needs of more vulnerable communities such as Weymouth and Portland, Boscombe and Alderney/Turlin Moor, areas which may lack the resilience to cope with the impacts of further reductions to public expenditure.
Feedback from our consultation work and national data identifies the following groups who face additional barriers to accessing advice, often having more complex advice needs and/or a reluctance to seek help from organisations they don’t know or trust.

These groups are:

► Lone parent families and families with more than 2 children
► People with a disability, long term health condition or mental health problem
► Rurally isolated people
► Older people and young people
► Carers including young carers
► People on low incomes or who are experiencing poverty
► Long term unemployed, and those in insecure employment including self employment
► BME groups – in particular people from gypsy/traveller backgrounds

We anticipate an increase in the advice needs of these groups as new welfare reforms (such as roll out of Universal Credit) combined with reductions to in-work benefits, stricter benefit sanctions, a new work programme, digital by default and continued reductions to legal aid begin to take a cumulative effect. In order to mitigate against the potential adverse impacts of these changes on Dorset residents (a high proportion of these being elderly or disabled), we believe we have created some solutions, in the form of our recommendations.

Our brief is to recommend a way forward for advice services over the next five years.

We have reviewed the factors which will determine advice needs locally and nationally, and analysed the current local provision, taking account of the views from a number of stakeholders.

Our evidence shows that:

► Advice needs are set to increase, with more individuals likely to fall into the category of ‘vulnerable’.
► Whilst there is a range of local agencies providing advice, there are challenges and barriers to effective service delivery, of which the most significant are: funding for core services, co-ordination, navigation through an increasingly complex geo-political landscape, data sharing and recording/demonstrating outcomes
► There are opportunities for us to work better together – across the sector and with local authorities - and to maximise the use of new technology in delivering advice
► We must invest in preventative measures in order to save money – for example CAB nationally has found that GPs in England spend almost one fifth (19 per cent) of their consultation time on patients’ non-health issues. This translates to an implied cost of nearly £400 million to the health service
Key Recommendations

Our recommendations

► Dorset County Council support the development of an Advice Partnership, and identify a lead agency to take on a co-ordinating role designed to ensure smarter working and better collaboration across the sector.

► There should be adequate investment made to improve, expand and promote a co-ordinated single point of entry to advice services, maximising the use of existing provision, new technologies and building on local good practice.

► The lead agency develops effective referral pathways to identified partner agencies who can provide specific expertise and/or other specialist support services.

► Funding is identified and ring-fenced to support core advice services and one-off projects which develop capacity or pump-prime new services within the sector.

► Commissioning processes involve the voluntary sector in co-design and co-production to ensure that advice services remain responsive to client need, develop capacity and achieve the required outcomes.

► There is continued support for agencies which provide infrastructure support to the wider advice and support sectors, and/or provide services to hard to reach groups/communities.

By adopting these recommendations we anticipate the following 5 Outcomes can be achieved:

1. An increase in the number of people accessing the right advice when they need it
2. A reduction in people reaching crisis point
3. An end to ‘wrong door syndrome’ – all users will get the advice they need
4. A joined up advice service and sector with all partners maximising their ability to participate and contribute
5. Sustainable and transparent funding processes, embedding accountability and value for money
How will we make this happen?

The statutory and voluntary sectors need to work together as partners to ensure that

- Sustainable funding envelopes are in place.
- A clear and measurable performance targets/outcomes framework is developed. Five headline outcomes have already been devised with the intention of reducing preventable demand. Further sub indicators need to be designed which align with other local outcomes frameworks such as those being used by Health and Wellbeing Boards and the Better Together programme.
- Ongoing evidence gathering as to nature of demand and supply needs to be commissioned.
- An audit of current investment, resources and assets needs to take place to help facilitate developments such as merger, co location and resource sharing that reduce delivery costs and enhance client experience thus making it easier to plan more effectively for the future and work in smarter ways.
- A co-ordinated training plan for advisers should be prepared and implemented on a multi agency basis.
- A rolling review of innovative new approaches to support provision is instigated.
- The use of new technologies is maximised.

Clearly there will need to be consultation with a variety of stakeholders and partners, including local authorities at all stages of the development of an Advice Sector Action Plan. We consider that a forum comprising key representatives from the statutory and voluntary sectors – an Advice Partnership – will support engagement and ownership of the strategy, and effective implementation of the action plan. Partners will need to be committed to the Vision and agree values and ways of working together.

The importance of an appropriately funded and independent advice sector is paramount.
For the purposes of this strategy we are defining these terms as follows:

**Casework:** The organisation takes on responsibility for the conduct of a case and the caseworker takes action on behalf of the client. This may include negotiation and representation on the client’s behalf including at appeal proceedings and court hearings where necessary. The organisation drives and manages the case, generally devolving responsibility to a caseworker who will have a continuing relationship with the client.

**Generalist advice:** Includes exploring a client's situation, diagnosing the client’s problems, giving information and explaining options, helping the client decide between options, and giving assistance such as form-filling and identifying next steps. Generalist advice may also include taking limited action on behalf of the client to move the problem on through contact or intervention with a third party or parties.

**Information:** The provision of materials that provide facts of a generic nature, i.e. the information is not personalised to any one individual. There is an increasing emphasis on providing reliable ‘self-help’ information that individuals find and use themselves, often via the internet, but also through good-quality information leaflets. NB: ‘information, advice and guidance ‘ (IAG) is terminology more associated with the careers/job-seeking sectors.

**Infrastructure support:** Used in this strategy to mean the support needed to ensure an organisation is robust, legally compliant, adequately resourced and sustainable, and therefore able to deliver its core service. This includes support on: governance, structure, finance, HR, training, volunteer management, quality, funding, and compliance. Support is provided to Trustee Boards, staff and volunteers in a range of formats. There is also a strong element of keeping the sector informed, encouraging collaboration and partnership working, and acting as a voice for the sector with stakeholders, including local authorities. Key infrastructure support organisations locally include the three ‘councils for voluntary service’ (for the wider VCS), Citizens Advice in Dorset (for CAB and wider advice sector), Dorset Race Equality Council (for minority groups), and Continuum 0-19 (for young people’s services).

**Signposting:** The provision of basic information including contact details, about other providers of services based on the needs of the client and on knowledge of other organisations. There is no attempt to determine the outcome of the signposting. Referral involves making direct contact with another agency for an appointment, and can involve passing on some information about the case and seeking feedback on what outcome was achieved.

**‘Triage’ services:** Some advice organisations, including Citizens Advice, use a model for a short initial check with a client to find out what sort of help they need and whether they are able to manage things themselves if directed to appropriate information. In the Citizens Advice model this is referred to as a ‘gateway assessment’ and at the conclusion a decision is made as to the ‘next step’ which will range from signposting to an appointment with a caseworker. The rationale is to improve access to the service, and to ensure that those identified as in ‘greatest need’ get the help they needed, whilst others are directed to high quality self-help materials.
1. Current Position

1.1 The current landscape - Dorset, Bournemouth and Poole

Further detail and sources are in Appendix 1

Dorset is an average size county with a high quality natural and built environment, and low levels of unemployment and crime. However there are distinct pockets of poverty and issues around access and affordable housing. There is a large gap between average incomes (£459/wk) and average house prices (£211,628). There are clear differences between the predominantly rural ‘shire’ county of Dorset and the urban areas of Bournemouth and Poole, however a common feature of all three areas is above average numbers of people in the 65+ age group. There are also estimated to be 130,000 people with a disability.

Bournemouth, along with Poole and Christchurch, forms the South West region’s second largest principal urban area. Bournemouth and Poole have many positive features, including Bournemouth’s status as a popular resort, but there are also areas of high deprivation. Poole now has seven Lower Super Output Areas ranked in the lowest quintile for deprivation. Seventeen of Bournemouth’s 107 LSOAs are also in this lowest quintile, including Central Boscombe which is ranked 113th in England, and is the most deprived area in the South West. A key feature across the sub-region is inequality and hidden deprivation, from low income families in a village living next door to a second home owned by a high earner, to health factors, for example, men in the most deprived parts of Bournemouth can expect to live 8 years’ less than men in other parts of the town.

A recent Place Profile produced for CAiD by Local Futures ranks Bournemouth/Dorset/Poole in the middle of 53 sub-regions in terms of economic indicators, business and enterprise. It ranks as the top region for the highest average age of residents (43.31 years) and the ethnicity profile for the authorities places it in the lowest 40% of sub-regions nationally, with 3.95% of the population described as non-white (Bournemouth 8%, Poole 4.15% and Dorset average 2%).

The three upper authorities, Dorset County Council, Borough of Poole and Borough of Bournemouth increasingly work jointly on initiatives such as implementing the Care Act (Better Together). The Local Economic Partnership covers the so-called pan-Dorset area. The six district councils in the county also work together, but not always in the same combinations. For example Westwey provides Revenues and Benefits services for Purbeck, West Dorset and Weymouth/Portland, whilst the Stour Valley Partnership provides these services to Christchurch, East Dorset, North Dorset and Poole. However, North Dorset district now shares a Chief Executive with West Dorset. There is one Clinical Commissioning Group and two Health and Wellbeing Boards (Dorset and Bournemouth/Poole). There are discussions currently taking place about a proposed ‘super council’ with the merger of Bournemouth, Poole, Christchurch and East Dorset. The complexity of these ‘geopolitical’ structures present challenges for voluntary sector organisations who may work across boundaries – and, of course, for residents wondering who provides what service, and which way to go if they live near a border. It also presents opportunities for better joining up and working in partnership.

Added to this there can be huge access challenges; signing on for Jobseeker’s Allowance if you live in Gillingham without your own car involves a one hour bus journey via Shaftesbury to get to Blandford Jobcentre at a cost of nearly £10 return. Digital access is improving with the superfast broadband roll-out but for significant areas of Dorset plans for fibre broadband are ‘still being developed’ (source: Dorsetforyou). Lack of access to mains gas is also a significant feature of rural Dorset and adds to a significant percentage of residents (14.6%) living in fuel poverty.
SIGNIFICANT FEATURES

Dorset, population 416,720
► Ageing population – 26% aged 65+ (national 17%)
► Distinct pockets of poverty hidden behind the ‘rural idyll’: 12 Lower Super Output Areas in lowest quintile for deprivation (of which 9 are in Weymouth & Portland)
► Limited employment opportunities including concentration of jobs in low paid and/or seasonal sectors.
► Access: public transport and transport infrastructure, services, fast broadband
► Affordable housing: gap between average incomes (£459/wk) and average house prices (£211,628).

Poole, population 149,010
► 7 Lower Super Output Areas ranked in the lowest quintile for deprivation.
► Significant proportion of people with learning disabilities and mental health issues.

Bournemouth, population 188,730
► 17 of Bournemouth’s 107 LSOAs ranked in the lowest quintile, including Central Boscombe (113th in England, most deprived area in the South West)
► There are around 2,200 children living in low income families, around 600 in just four localities (LSOAs).
► There are five wards with more than a quarter of children living in poverty
► 53% of working age claimants are receiving incapacity benefit for mental health illness, compared with 43% across England and Wales. For ESA 55% of claimants are receiving this benefit for mental health illness reasons, compared with 46% across England and Wales.
1.2 The Dorset Advice Sector

The wider Voluntary, Community and Social Enterprise Sector (VCSE) in Dorset, Bournemouth and Poole

The voluntary, community and social enterprise (VCSE) sector in Dorset contains around 2,300 registered VCSEs, and a further 4,600 unregistered. The total annual income of the sector is about £300m, with the VCSE employing 12,900 people, or 4.3% of the Dorset workforce. The sector is significantly more likely to provide part-time work, for women, older and disabled workers. In Dorset there are about 94,000 volunteers providing almost seven million hours per year, a replacement value of about £93.5m per year. The ‘advice sector’ is a part of this sector.

The current advice sector in Dorset, Bournemouth and Poole

► 9 independent local Citizens Advice serving Dorset, Bournemouth and Poole, core advice services funded by districts and boroughs through Service Level Agreements, project funding from a range of sources.

► Citizens Advice services supported by the consortium Citizens Advice in Dorset. CAiD has a Service Level Agreement with Dorset County Council; funding includes an amount for each local county office to support training costs.

► Over 60 voluntary/not-for-profit/private sector organisations that provide advice as part of their role, funded from a range of sources which may include some local authority funding. It has been estimated in a recent survey of the voluntary, community and social enterprise sector that 11.8% of organisations are providing debt and money management advice services, 17.6% provide benefits advice and 17.6% providing advice services to combat employment discrimination. (Valuing Dorset’s VCSE Sector - 2014)

► A further group of organisations that provide a range of other support (practical, counselling, befriending) which people with advice needs may also require.

► The remit of these support organisations may be limited by their:
  • Geography
  • Specific skill set
  • Knowledge and expertise
  • Client group
  • Project-specific funding
  • Capacity including reliance on volunteers
Examples of voluntary sector organisations falling into these categories are listed below; information on these organisations can be found on www.advisedorset.org.uk

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<tr>
<th>Organisations providing advice in one or more areas of social welfare law</th>
<th>Organisations which provide some advice as part of a range of support services</th>
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<td>Boscombe Independent Advice Centre</td>
<td>Access Dorset</td>
<td>PRACTICAL</td>
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<tr>
<td>Citizens Advice</td>
<td>Age UK Bournemouth</td>
<td>Disability Action Group North Dorset</td>
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<td>Diverse Abilities</td>
<td>Age UK Dorchester</td>
<td>Salvation Army</td>
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<td>Hamworthy Advice Project</td>
<td>Age Concern (various)</td>
<td>Foodbanks</td>
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<td>Shelter</td>
<td>Ansbury</td>
<td>Churches such as the Vine Yard</td>
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<td>Tax Help for Older People</td>
<td>Christians Against Poverty</td>
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<td>Dorset Advocacy</td>
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<td>Dorset Race Equality Council</td>
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<td>Dorset Youth Association</td>
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<td>Faithworks</td>
<td>Dorset Cruse</td>
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<td>Life and Money Skills</td>
<td>SIGNPOSTING</td>
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<td></td>
<td>Mears Group</td>
<td>Dorset POPP Wayfinders</td>
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<td>Outset (self-employment)</td>
<td>SUPPORT for SPECIFIC GROUPS</td>
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<td>Quay Advice Centre</td>
<td>Dorset Association for the Blind</td>
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<td>Royal British Legion</td>
<td>MIND</td>
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<td>Training Providers</td>
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There are other not-for-profit, private and statutory agencies that provide advice as part of a range of services, including:

- Councils: county / borough / district
- Home Improvement Agencies (eg. Mears)
- Housing Associations

### Organisations providing infrastructure support:
- Bournemouth Council for Voluntary Service
- Citizens Advice in Dorset
- Continuum 0 - 19
- Dorset Community Action
- Dorset Race Equality Council
- Poole Council for Voluntary Service
- Volunteer Centre Dorset
Some organisations will have a recognised quality mark, such as PQASSO (Practical Quality Assurance System for Small Organisations) or Investors in People; these can be costly and smaller organisations may be unable to demonstrate they can meet all the elements. The **Advice Quality Standard** is the advice sector’s quality mark, covering systems, procedures, governance, staff and volunteer management, quality of advice, and client experience. All Citizens Advice Bureaux have the AQS - indeed it is not possible to be a member of national Citizens Advice without it. However very few smaller advice agencies are able to meet all the requirements; the AQS website only lists the nine local Citizens Advice and SUBU Advice (Bournemouth University) as holding the AQS.

It should also be noted that the aims of some advice organisations include using client evidence to highlight where systemic barriers with private or public policy make it difficult to resolve problems. Data and client experiences are used to highlight issues locally and nationally, and include recommendations to bring about change. Both Shelter and Citizens Advice have a ‘research and campaigns’ remit; a recent report produced by the Dorset Citizens Advice Research and Campaigns Group, “*Not a good time to be disabled*”, focuses on the difficulties faced by people with disabilities when claiming benefits.

**Our analysis highlighted some characteristics of the current sector which present considerable challenges for service delivery, and can adversely affect client experience and outcomes. These include:**

- Fragmented nature of the sector
- Lack of co-ordination
- Duplication of processes and services
- Confusion about who does what, where to go and how to refer and share information
- Lack of sustainable funding for core services
- Not all services are quality assured
- Reliance on volunteers
- Lack of focus or capacity to interpret intelligence or evidence delivery of outcomes and difference made
- Diverse range of systems and processes for recording and sharing data

**1.2.1 Mechanisms and processes for recording, storing and sharing data**

Our research told us that the systems and processes in place within organisations to undertake the key functions as listed below, are diverse and cover a wide spectrum of activity and resources.

- Maintaining client records
- Recording and demonstrating outcomes and impact
- Storing data and Information Assurance processes
- Performance management
- Quality assurance and audit
Smaller organisations struggle to undertake these important functions due to a lack of capacity, knowledge and ICT resource. Larger organisations with data bases such as Customer Relationship Systems (CRM) may lack the staff resource to fully exploit the systems they operate. Data bases and systems across the voluntary and statutory sectors are not aligned with each other. This makes it difficult to share data and ultimately clients are faced with having to tell their story more than once and interventions are duplicated or missed. It can also be difficult for data from the voluntary sector to feed into statutory planning processes. Concern over data sharing is a key factor.

This is an area for development which will require investment.

1.2.2 Funding for the sector

The pattern of funding for voluntary sector advice agencies is varied but the common feature is that almost all organisations rely on a package of funding from a range of sources, in the following categories:

- ‘Core’ funding to provide the basic service; this is sometimes referred to as ‘unrestricted’ funding but will usually be tied to some performance indicators even if referred to as a ‘grant’. Most CAB have Service Level Agreements with their District or Borough council. Other organisations may have funding from a combination of public sector sources, Local Authority, Police and Health.

- Restricted funding for specific contracts and/or projects. Some of this may be from the public sector, but the larger proportion comes from trusts and charitable sources: large national funders such as Lottery, Comic Relief and Macmillan, and smaller and/or local funds such as Dorset Community Foundation, the Valentine Trust, etc. This category also includes funding from the corporate sector through trusts such as Lloyds and utilities such as British Gas and Wessex Water.

- Legal Aid: due to significant cuts to the budget for publicly funded legal help (‘legal aid’) very few Dorset not-for-profit organisations now have contracts to provide advice under legal aid. Shelter has a contract which employs a housing law solicitor; Relate has a contract for family mediation work.

- Donations and fundraising activity.

- Investment income, for many now a minimal source of income.

- Income from membership and/or fees (if providing certain services, and permitted by an organisation’s governing document)

- Income from trading and/or social enterprise activities; this is an area yet to be fully exploited and may not be appropriate for some organisations to pursue.

- Legacies: some organisations have more ‘appeal’ in this area than others. A benefactor’s personal experience of an organisation or issue is an important factor.

- Corporate funding: although Corporate Social Responsibility now has a higher profile, it is difficult to quantify this across the sector and currently it only represents a small proportion of actual monies received. However there are developing opportunities of the ‘help in kind’ and ‘pro bono’ format, which includes employees loaned for specific tasks.
This portfolio of funding presents an organisation with a number of headaches including:

- Disproportionate reporting requirements for small amounts of money.
- Inability to plan for the future as much funding is still year-on-year.
- Difficultly retaining key staff/expertise as contracts end.
- Dilemmas regarding the production of funding bids: produce bids that meet identified client need and organisational objectives or shape bids solely to meet a funder’s requirements.

Our analysis of funding for the 9 Citizens Advice is shown below. It should be noted that the proportion of funding from local authorities has reduced substantially over the last 15 years. In addition no CAB locally now receives any funding from the Legal Services Commission, due to the restriction on the scope of work which can be done under ‘legal aid’. ‘Donations’ includes fundraising activities and events. The largest proportion of expenditure is on staff costs (management, administration, project work). It is estimated that 90% of the CAB service is provided by volunteers, but this is not a cost-free option, as volunteers need to be appropriately trained and supervised and funded for out-of-pocket expenses (the bulk of the ‘travel expenses’ shown below). Citizens Advice estimate the cost of training a volunteer adviser to be over £2,000. There are over 550 CAB volunteers in Dorset which constitutes a considerable resource.

Citizens Advice Total Income 2013/14
Dorset Bournemouth and Poole
£2,073,004
[Dorset Only: £1,482,177]

- 51% Local Authority Grants
- 0% Investment Income
- 3% Donations
- 46% Other/Projects

Citizens Advice Total Expenditure 2013/14
Dorset Bournemouth and Poole
£2,015,550
[Dorset Only: £1,445,472]

- 70% Staff
- 10% Premises
- 2% Travel
- 18% Other
- 70% Staff
Other advice sector and support organisations have similar mixed patterns of funding; many have incomes under £100k with a few in the £100 - £500k bracket. Some told us that they were ‘over 90% reliant on contracts’ and/or highly dependent on fundraising activities. There is a common misperception that voluntary sector organisations are over-reliant on public sector funding – this is not the case. The ‘Valuing Dorset’s VCSE Sector 2014’ report states that 72% of organisations do not receive any state funding at all. In Dorset, larger charities with incomes of more than £1m per year are likely to be regional or national or have other roles (e.g. running a school); they include: National HQ of the RNLI (£175m); Bournemouth Churches Housing Association (£19.5m); Autism Wessex (£9.6m); Bournemouth YMCA (£3.2m).

Almost all voluntary sector advice organisations are registered charities and larger ones are likely to be incorporated as well, i.e. companies limited by guarantee. New organisations can opt to be ‘Charitable Incorporated Organisations’ (CIOs). Other structures include:

<table>
<thead>
<tr>
<th>Type of organisation</th>
<th>Local examples</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership organisations</td>
<td>Dorset Association of Parish and Town Councils</td>
<td>Income from membership fees enables services to be provided</td>
</tr>
<tr>
<td>Community Interest Company</td>
<td>Active Dorset, Access Dorset, Boscombe Community Interest Company</td>
<td>CICs are limited companies with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners. Feedback suggests it takes time to generate sufficient income for longer term activity.</td>
</tr>
<tr>
<td>Community Partnerships and Development Trusts</td>
<td>Bournemouth 2026 – includes a Community Land Trust, North Dorset Community Trust</td>
<td>Likely to be a charity and/or 'company limited by guarantee not having a share capital'; can seek funding from various sources including membership fees</td>
</tr>
</tbody>
</table>

Other resources in the voluntary advice sector include premises, equipment (largely IT) and volunteers: there are currently around 550 volunteers working in the Citizens Advice Service across Dorset, Bournemouth and Poole. The Volunteer Centre Dorset interviewed 1,117 potential volunteers in 2014/15 and advertised in the region of 2,000 vacancies.
We recommend that the sector undertakes a full audit of current investment, assets and resources to look at ways of smarter working and more cost-effective investment, to include:

► Identifying gaps and duplication
► Identifying opportunities for further partnership working across Dorset, Bournemouth and Poole, including options for mergers and/or co-location
► Creating new mechanisms for delivery such as joint trading companies, community interest companies and social enterprises
► Sharing of back office functions and leadership teams
► Joint purchasing arrangements
► Income generation

1.3 The need for advice now and in the future

1.3.1 The people who currently need advice

We are including a snapshot from three organisations providing advice-related services to the community: older people (Dorset POPP), young people (Ansbury) and Citizens Advice (all ages).

Dorset POPP had over 70,000 contacts during 2013/14 with people aged 50+ in Dorset

► There was an increase of 8% (1492 – 1614) in the total number of ‘complex’ clients Wayfinders have supported
► 4,995 clients received 1:1 support
► Top issues for clients: social integration, health and wellbeing, housing (including safety) and financial (68% benefits, 23% debt/money advice, 9% pension advice and support)

Ansbury and Dorset Youth Association

► In June 2015 Ansbury identified 493 young people (3.7%) not in education employment or training (NEET). This figure is increasing as are the numbers of young people in jobs without training currently estimated at more than 700 young people in Dorset alone.

Citizens Advice during 2014/15

► 27,434 people helped
► 62,972 new issues
► 2.3 issues per client on average
► 268 client contacts each working day
► 24% requiring ‘case work’ support
► Significantly more women than men accessing the service
► 34% of clients described themselves as disabled or with a long-term health condition
► 15,676 calls answered by AdviceLine
A breakdown of issues and outcomes for Citizens Advice during 2014/2015 is shown below.

- 31% Benefits and Tax Credits
- 4% Consumer Goods and Services
- 21% Debt
- 10% Housing
- 7% Relationships and Family
- 3% Other
- 4% Legal
- 1% Immigration and Asylum
- 9% Employment
- 1% Education
- 0% Discrimination
- 2% Utilities and Communications
- 1% Travel and Transport
- 1% Tax
- 2% Financial Services and Capability
- 1% Travel and Transport

Debts Written Off £2,174,022
Debt Payments Rescheduled £207,056
Income Gain £6,852,709
## 1.3.2 Predicting future demand for advice: national factors / local impact

A number of key factors will affect advice needs now and over the next 5 years; these are summarised below. More details and links to supporting documents and data are in Appendix 1, which also includes a Glossary.

<table>
<thead>
<tr>
<th>Factor</th>
<th>What it includes</th>
<th>What it means locally</th>
</tr>
</thead>
</table>
| 1      | Continuing reduction in public expenditure | **On-going ‘austerity’; reduction in public sector funding and services (local authorities, health etc)** | • Continued pressure on local services, leading to reductions and/or closures (eg Dorset Youth Service)  
• Uncertainty over future provision (eg. health - Clinical Services Review on hold)  
• Systems failure  
• Increased pressure on voluntary sector |
| 2      | Welfare Reform: on-going | **Continued roll-out of Universal Credit** | • People need to be able to claim online (see 5 below)  
• Greater need for financial capability support to help people budget on monthly income  
• Stricter claimant commitment may lead to more ‘sanctions’ to benefits  
**Transfer of claimants from Disability Living Allowance to Personal Independence Payment** | • Tighter criteria will affect high number of Dorset residents currently claiming DLA  
**Continued impact of under-occupancy charge** | • Shortage of smaller housing units for people to move or transfer to |
| 3      | Digital by default | **Concentration and centralisation of services online e.g. Universal Credit must be claimed online** | • Poor broadband in some areas  
• Availability of broadband does not always mean people can afford the service  
• Adversely effects people who lack appropriate skills, knowledge, confidence and/or equipment to both find information on-line and complete complex applications on-line (UC) |
| 4      | Legal Aid | **Continuing reduction to what is ‘in scope’ for ‘legal aid’** | • People cannot get the specialist advice and representation required in social welfare law  
• Key area: Family Law - increasing pressure on Family Courts with litigants-in-person needing additional time |
<table>
<thead>
<tr>
<th>Factor</th>
<th>What it includes</th>
<th>What it means locally</th>
</tr>
</thead>
</table>
| 5      | Welfare Reform and Work Bill 2015 and requirements of the new work programme | Restrictions to in-work benefits including changes to tax credit thresholds | • Will affect local people in low paid part-time work  
• Will affect people with more than 2 children  
• Difficulties accessing affordable child care  
• ‘Living wage’ may lead to job losses |
|        | Universal Credit | • More pressure on people to take lower paid and/or less secure job options to avoid sanctions  
• More difficult to start self-employed work  
• Need for more apprenticeships for young people |
|        | Freezing rates of working-age benefits | • People with higher living costs as a result of where they live, who they rent from, how they pay for utilities etc, likely to be adversely affected. |
|        | Benefit cap for households reduced | • As above |
|        | 18 -21 year olds no longer able to claim Housing benefit | • Restricts housing options for this group  
• Restricted access to Information Advice & Guidance services |
| 6      | The Care Act | New duty for Local Authorities to ensure information is available | • High proportion of older people, people with disabilities, and carers living in Dorset/Bournemouth/Poole  
• Complex information needs to be accessed and understood at a time when people are likely to be vulnerable and/or in poor health  
• People need impartial explanation of options  
• Higher number of ‘self-funders’; may be adversely affected by delay to cap on care costs and/or inability to access appropriate specialist financial advice |
<table>
<thead>
<tr>
<th>Factor</th>
<th>What it includes</th>
<th>What it means locally</th>
</tr>
</thead>
</table>
| 7      | Proposed extension to Right to Buy | Possible extension to Housing Association tenants | • Currently, finding suitable and affordable housing is a concern for many local people  
• Risks reducing availability of social/affordable housing for those most in need |
| 8      | Proposed new Immigration Bill | Introduces ‘deport now, appeal later’ process | • Very limited access in Dorset/Bournemouth/Poole to specialist immigration advice |
| 9      | Refugees | DCC dispersement plans for refugees | • Impact on services which are already stretched  
• Potential ‘community cohesion’ issues particularly in rural areas  
• New refugees may be isolated, excluded unaware of who can help, unable to access interpreters |

The cumulative effect of these factors is likely to lead to an increased need for impartial, independent, accurate and timely advice in relation to social welfare issues, particularly but not exclusively for the most disadvantaged people. There is likely to be an increase in social inequality. Across the advice sector there is concern that at the same time as demand is set to increase, adequate and sustainable funding for advice services is at risk.

1.3.3 Predicting future demand for advice: people most affected and/or hardest to reach

Research from our consultation work and national data identifies the following groups who face additional barriers to accessing advice, often having more complex advice needs and/or a reluctance to seek help from organisations they don’t know or trust. People in these groups are also more likely to be disproportionately affected by the factors identified in 1.3.2 above.

These groups are:

- Lone parent families and families with more than 2 children
- People with a disability, long term health condition or mental health problem (In 2014/15 34% of CAB clients identified themselves as in this group)
- Rurally isolated people
- Older people and young people
- Carers including young carers
- People on low incomes or who are experiencing poverty
- Long term unemployed, and those in insecure employment including self employment
- BME groups – in particular people from gypsy/traveller backgrounds
- Individuals requiring specialist advice previously met through legal aid for example, family law
Factors affecting future demand for advice

Clients with capacity and capability to access self-help resources, and know where to go: internet, websites/webchat, online calculators, fact sheets, template letters, telephone helplines

Clients who need more personalised support to deal with current situation due to complexity and/or lack of capability and capacity, unresolved issues likely to have serious consequences

Clients with complex advice needs who lack capacity and capability and who are already experiencing crisis and hardship and need specialist support

General information needs

More personalised support

Complex advice needs

The lower two segments are likely to grow

Citizens Advice clients are almost five times more likely to live on a low income as an average member of the England and Wales Population (Citizens Advice Impact Report 2015).

1.4 National Research

1.4.1 Learning from the Low Commission

“The situation for frontline advice has continued to deteriorate, and with it the options for citizens to resolve problems or obtain redress on social welfare law matters.”

Lord Colin Low

The Commission highlights the need for the public, particularly the poor and marginalised, to have access to good quality independent legal advice and for agencies to get it right first time.

The Commission has made some overarching recommendations:

- Local authorities or groups of local authorities should co-produce or commission local advice and legal support plans with local not-for-profit and commercial advice agencies. These plans should review the services available, including help lines and websites, while targeting face-to-face provision so that it reaches the most vulnerable.

- Public legal education should be given higher priority, both in the school alongside financial literacy, and in education for life, so that people know their rights and know where to go for help.

- Central and local government should do more to reduce preventable demand.
The Commission also developed some key principles which include:

► Early intervention to avoid the escalation of problems
► Developing different service offerings to meet different needs
► Embedding advice in settings where people regularly go such as GP surgeries
► The importance of ‘public education’

http://www.lowcommission.org.uk/

1.4.2 The importance of partnership working and early intervention – the economics of accessing good quality advice at time of need

When people get into difficulty, they need to be able to get the right information and advice as early as possible. If this information and advice is not available, they are more likely to become unemployed, homeless or in debt and, not only will they suffer distress, but the state will incur increased costs.

Using housing and homelessness as an example:

Comparative economic cost of taking early action compared with not providing help at the time of need in 2010/11

► **Homelessness advice and support** - cost of a homelessness prevention or housing options scheme that leads to successful prevention of homelessness £699
► **Rough sleepers** - average annual local authority expenditure per individual £8,605
► **Average fiscal cost of an average complex eviction** £7,276

Figures from 2014 indicate that the cost to a Local Authority of dealing with a homeless family (providing temporary accommodation or social services support) can cost £24,000 to £30,000. Citizens Advice nationally estimate that for every £1 spent on advice the service generates £1.51 in fiscal benefits, by reducing demands on health services, local authority homelessness services and out-of-work benefits. (Impact Report 2015)

According to local research on older people’s prevention services undertaken by the National Development Team for Inclusion in 2013, it is estimated that the following savings and value can be achieved through investment in preventative services:

► For every £1 spent on groups to prevent social isolation, an estimated £1.19 in health care costs is prevented. If quality of life is included, every £1 spent on groups to prevent social isolation provides a total social value of £13.82.
► For every £1 invested in the Safe And Independent Living Project a further £3.15 may be saved in further referral costs.
► The national evaluation of POPP pilots found that was a decrease of £30.16 per person in GP and outpatient costs for those who used well-being, emotional or social isolation projects (Windle et al, 2009).
2. Where do we want to be?

2.1 Consultation process

Contributions to this strategy were sought from a range of organisations from across the voluntary/ community and statutory sectors. Over thirty Individuals or groups were chosen to participate on the basis that they were involved in a combination of the following activities in relation to advice services and advice related services that specifically focussed on social welfare.

► Commissioning
► Funding
► Direct delivery of services
► Supporting development of infrastructure
► Signposting and referring to other advice services
► Community of interest/hard to reach groups

The consultation process was undertaken over a period of 6 weeks in June/ July 2015. The focus of these discussions was to determine the priorities for the strategy, identifying gaps, challenges, solutions and sharing relevant information, experiences and evidence to illustrate the points being made. The points made below are from a ‘provider perspective’ - further detail, and a SWOT (Strengths, weaknesses, Opportunities and Threats) analysis can be found in Appendix 2.

2.1.2 Overarching themes

<table>
<thead>
<tr>
<th>Agencies told us that advice services need to be...</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Client centred and able to meet the different advice needs of various groups, from the ‘self-helper’ to the ‘hard to reach’</td>
</tr>
<tr>
<td>• Able to provide early intervention and prevention support, to avoid things reaching crisis point</td>
</tr>
<tr>
<td>• Quality-assured</td>
</tr>
<tr>
<td>• Able to demonstrate the social value and impact of advice services</td>
</tr>
<tr>
<td>• Collaborating to improve efficiency and the client experience</td>
</tr>
<tr>
<td>• Open to the opportunities - and challenges - of working in partnership, including sharing resources and back-office support</td>
</tr>
<tr>
<td>• Intelligence-led and able to feed intelligence into the co-design of advice services, commissioning and funding plans</td>
</tr>
<tr>
<td>• Able to develop capacity and social capital within the voluntary sector and within communities</td>
</tr>
<tr>
<td>• Able to maximise existing resources with a ‘can do’ approach</td>
</tr>
<tr>
<td>• Recognised for the value of volunteers and that appropriately supported and trained volunteers are not a no cost/low cost option</td>
</tr>
</tbody>
</table>
Agencies told us that advice services can be uncoordinated because...

- Providers often don’t know or understand each other’s services, professional and/or geographical boundaries and processes, and there can be a lack of trust and reservations about quality.
- One agency may only deal with part of the person’s problem, but clients do not get passed on due to perceived barriers about data sharing and/or inadequate referral procedures.
- Some agencies lack capacity to accept referrals.
- Providers do not or cannot record outcome data.
- There is potential competition for clients and funding – therefore potential for duplication, though agencies may be unaware of this.
- There are cost implications of providing services in some areas, in particular rural areas.

Agencies told us that clients report the following experiences...

- They don’t know who can help them on a particular issue.
- They either live in an area with no providers, or an area with a range of providers but are confused as to who does what.
- There is inadequate or sketchy information about providers, and it’s not clear if they meet criteria for specific services.
- They have to keep re-telling their story and are passed ‘from pillar to post’ between agencies without effective referral or information sharing processes, getting into a ‘revolving door syndrome’.
- Are confused by the customer journey with multiple transactions.

2.1.3 The local context: Concerns and evolving solutions

When asked about the local external environment the key concerns are shown below; we have set these alongside work and initiatives that have the potential to mitigate.

<table>
<thead>
<tr>
<th>Common Concerns</th>
<th>Emerging Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complex Local Authority structures, on-going local government review and re-organisation, and re-allocation of responsibilities within and across authorities</td>
<td>• Initiatives and strategies which work across all 3 upper tier authorities e.g. the Better Together programme</td>
</tr>
<tr>
<td></td>
<td>• Cost savings and co-ordination by joining together, e.g. the tri-council partnership</td>
</tr>
<tr>
<td></td>
<td>• Integration of Emergency Local Assistance with Supporting People</td>
</tr>
<tr>
<td>Complex commissioning and funding processes, with an as yet untested approach to co-design and co-production</td>
<td>• Greater appetite to work together</td>
</tr>
<tr>
<td></td>
<td>• Facilitation of earlier conversations to produce Market Position Statements</td>
</tr>
<tr>
<td></td>
<td>• Opportunities for alternative delivery mechanisms – local authority trading companies, social enterprises</td>
</tr>
</tbody>
</table>
### Common Concerns | Emerging Solutions

| Ineffective interface between health and social care | • Better Together Programme  
• Health and Wellbeing Boards  
• Intelligence from Healthwatch Dorset  
• Dorset POPP and potential to develop as an ‘all ages’ service |
|---|---|
| Fragmented and potentially vulnerable voluntary sector, dormant ‘Compact’ | • DCC’s ‘Joining the Dots’ programme  
• Local Advice Networks  
• Support for infrastructure groups such as Dorset Community Action  
• Regular liaison between DCC’s Chief Executive and the voluntary sector |
| Uncoordinated training provision and potential skills gaps | • Better Together: workforce development |
| Ineffective use of data from the advice sector and difficulties for sector to prove the value of preventative work | • Better Together Outcomes Framework  
• Local Authority Mosaic data  
• Connecting Advice in Dorset  
• Local research recently e.g. the Economic Value of Older People’s Preventative Services (NTDI) and Valuing Dorset’s VCSE sector |
| Identifying gaps, unmet need, duplication, and knowing who can reach the ‘hard to reach’ | • Development of joint working including co-location, maximising assets, capacity building  
• Improved information on local services – ‘Joining the Dots’ and’ Connecting Advice in Dorset’ |

#### 2.1.4 What’s working well?

**Opportunities to Collaborate:** There is a willingness to work together, evidenced in the development of ‘hubs’, ‘one stop shops’, and the wider role and remit of libraries. Formal partnerships through consortia (CAiD, Continuum 0 -19) and less formal groupings such as poverty action groups and Local Advice Networks are now well-established.

**Information and Knowledge Sharing:** Demonstrated by increased access to training, advice conferences, and other fora e.g. Dorset Communities Forum, Welfare Benefits Forum.

**Knowing Who Does What:** Websites such as Advice Dorset, MyLifeMyCare, and information dissemination e.g. ebulletins.

**Testing New Ways of Working:** More evidence of sharing/pooling resources, testing new technologies (e.g. skype, use of media and film making), and increasing the range of opportunities for volunteering.
2.1.5 What isn’t working well?

Capacity: There is a perception that the voluntary sector is filling the gaps as the statutory sector retracts. Senior manager are fire fighting to keep services open and have little opportunity to think strategically. An increased burden falls on volunteers leading to potential risk, and recruitment/retention issues. There are on-going concerns about resources (premises, broadband), changing funding regimes and short term funding.

Engagement: There is a perception that the voluntary sector cannot shape strategic direction as it is not seen on an equal footing; the diversity, scope, value and ability to provide solutions are not always recognised. This is compounded by current procurement rules impeding co-design. There are also issues about duplication across the sector, and the dilemma as to whether organisations collaborate or compete or both.

Client Experience: The sector is concerned about clients feeling confused or lacking awareness of where to go for help. There are issues around understanding what happens to those who do not return for follow-up appointments, or are who are signposted elsewhere, with no consequent ability to find out what outcome was achieved.

2.1.6 The importance of partnership working and being intelligence led when setting priorities

In setting priorities that are based on evidence, advice agencies consider there can be a number of benefits. These include for partners the ability to:

► Forecast preventable demand and therefore work together to obtain the resources and create the structures and delivery arrangements to meet the emerging needs in a timely way

► Contribute more meaningfully to the co-design of services with commissioners

► Inform the development of funding bids, having the ‘intelligence’ to demonstrate client need

► Effectively demonstrate the value of a service, costs saved and outcomes for clients

► Better provide the delivery mechanisms by which people who need advice can access it in a format that works for them

Some examples of key data sources for partners to utilise are:

► Citizens Advice tracking of trends through PETRA

► MOSAIC

► POPPI and PANSI

► Office of National Statistics Neighbourhood Data
2.1.7 The importance of partnership working for innovation and developing good practice

During the consultation we identified many initiatives where working in partnership had led to new ways of working and sustaining projects. Here are just a few examples:

Community Libraries and Friends of Libraries
Financial restraints provided an opportunity and challenge to create eight Community Libraries. They were handed over to local communities in May 2013 and are now managed as community assets by their community. Under an agreement Dorset Council makes an annual grant towards the library, supplies new books and provides professional advice. Computers are also provided at these libraries for public use.

ADTV Citizens Journalism Project
Giving people a voice and helping them to use it. ADTV is about learning new skills and gaining the confidence to communicate to a wide audience about the things that matter to people using film and media. Over 80 films have been made with over 5,000 views.

Social Prescriptions
An innovative social prescribing advice service delivered in partnership with GPs and CAB Advisers with the aim of improving a client’s health and wellbeing whilst reducing the amount of time spent by GPs on non-clinical issues.

Citizens Advice Outreach in Children’s Centres
An effective way of taking advice into a setting where parents with children feel comfortable. Advisers liaise with centre staff who then offer ongoing support.

Safe And Independent Living Project (SAIL)
Offers residents of Dorset free support, services or information to help keep them safe and independent in their own home. SAIL is a Dorset wide partnership between local authorities, Dorset Fire and Rescue Service, Dorset Police, third sector organisations, local groups and services, Dorset Energy Advice Service Centre, Age UK, and the local health service.

The Connecting Advice in Dorset Project
CAiD is the lead for this 2 year project, funded by the National Lottery through the Big Lottery Fund, working in partnership with Shelter (Bournemouth), Dorset Race Equality Council, Ansbury (information, advice and guidance for young people), and the nine member CAB. The aims of this ‘advice service transition fund’ project are to improve collaboration between advice agencies across Dorset, Bournemouth and Poole, increase access to advice, and provide support to advice agencies in order to improve their resilience and ability to provide a quality service. Key activities have included:

► preparing a database of advice providers pan-Dorset (now on www.advisedorset.org.uk)
► supporting the development of eight Local Advice Networks,
► providing 90 free training courses, attended by over 400 delegates,
► running conferences for staff working in the advice sector
► establishing a Welfare Benefits Forum,
► completing a joint exercise to monitor the impact of advice across 12 organisations
► providing support on quality assurance, good practice for referrals, equality and diversity
► piloting the use of new technology (using Skype to deliver advice in rural areas of Dorset).
Respondents to a survey in June 2015 highlighted the value of free training, being kept up-to-date via ebulletins and conferences, and the value of networking; one organisation commented that it now had more partners to which to refer clients

2.2 What does all this tell us?

We have reviewed the factors which will determine advice needs locally and nationally, and analysed the current local provision, taking account of the views from a number of stakeholders. Our conclusions are:

► Advice needs are set to increase, with more individuals likely to fall into the category of ‘vulnerable’.

► Whilst there is a range of local agencies providing ‘advice’, there are challenges and barriers to effective service delivery, of which the most significant are: funding, co-ordination and navigation through an increasingly complex geo-political landscape.

► There are opportunities for us to work better together – across the sector and with local authorities - and to support the use of new technology in delivering advice.

Our proposals for developing an effective advice strategy are set out in section 3.
3.1 Delivery Model

Our recommendation is that there needs to be a clear structure for the advice sector, incorporating a strategic vision, planning, funding mechanisms and delivery:

- Establish an Advice Partnership
- Produce a comprehensive map of the advice sector: investments, assets and resources.
- Identify a lead agency which can respond to emerging needs and effectively support the provision and development of advice services. This organisation will have robust governance and clear lines of accountability; it will be able to work with other agencies through a range of methods.
- Promote and expand a single point of entry to core social welfare advice services that meet sector specific quality standards.
- Develop relationships and systems that ensure appropriate and effective signposting and referral to providers of other support and/or targeted services where necessary.
- Support joint work to improve quality in terms of advice provision, systems, procedures, working practices and improved data sharing arrangements.
- Enable joint funding applications to statutory and trust funders.
- Make available advice-related multi agency training.
- Provide public information on key advice issues.
- Provide a voice for clients.

This model of delivery requires appropriate investment to:
The **lead agency** will have robust governance and clear lines of accountability; it will be able to work with other agencies through a range of methods.

It will need **adequate funding** in order to

1. Promote a single point of entry for people needing advice
2. Provide a core advice offer and refer and/or signpost to other support services when necessary/appropriate
3. Support collaborative working to maximise resources and reduce duplication
4. Market the services available to users and providers
5. Demonstrate the impact of advice services
6. Support the wider sector to provide quality-assured services

Providers of other **support services** must be **adequately resourced** to:

1. Provide targeted services in their area of expertise
2. Sustain outreach activities and relationships with hard to reach groups and communities of interest

### 3.2 Suggested Milestones

To develop and implement an agreed Advice Strategy will need input from a spectrum of stakeholders, and a clear action plan identifying outputs, outcomes, timescales, resources and lead responsibility. As a first stage we have identified milestones along this route, and allocated a priority rating to these.

<table>
<thead>
<tr>
<th>Milestones</th>
<th>Priority</th>
<th>Stakeholders</th>
<th>Meeting Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a Dorset Advice Partnership (DAP)</td>
<td>High</td>
<td>Local Authorities</td>
<td>Joined up advice services / more people can access advice</td>
</tr>
<tr>
<td>- Identify and appoint a Lead Agency to develop DAP on behalf of stakeholders</td>
<td></td>
<td>CAiD</td>
<td></td>
</tr>
<tr>
<td>- Seek guidance from successful local models (e.g. 0-19 forum)</td>
<td></td>
<td>Advice agencies</td>
<td></td>
</tr>
<tr>
<td>- Determine membership</td>
<td></td>
<td>Local Advice Networks</td>
<td></td>
</tr>
<tr>
<td>- Agree governance, terms of reference, support and investment needs</td>
<td></td>
<td>Other Fora</td>
<td></td>
</tr>
<tr>
<td>- Engage with stakeholders, communities, users</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consolidate mapping of the advice sector</td>
<td>High</td>
<td>Lead Agency</td>
<td>Joined up advice services</td>
</tr>
<tr>
<td>- Build on work of Connecting Advice project, analysis undertaken for Dorset Advice Strategy, and other local research</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Produce an Advice Sector Action Plan</td>
<td>High</td>
<td>DAP in consultation with others above</td>
<td>Joined up advice services / end to ‘wrong door syndrome’ / more people can access advice</td>
</tr>
<tr>
<td>Establish Working Groups to take forward actions</td>
<td>High</td>
<td>DAP</td>
<td>Joined up advice services</td>
</tr>
<tr>
<td>Milestones</td>
<td>Priority</td>
<td>Stakeholders</td>
<td>Meeting Outcomes</td>
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<tr>
<td>Identify and ring-fence funding envelopes for advice service delivery and</td>
<td>High</td>
<td>Local Authorities</td>
<td>Sustainable and transparent funding processes / value for money</td>
</tr>
<tr>
<td>infrastructure support</td>
<td></td>
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<tr>
<td>Invest in special projects to build capacity and test new ways of working</td>
<td>Medium</td>
<td>Local Authorities</td>
<td>Sustainable and transparent funding processes / more people can access advice</td>
</tr>
<tr>
<td>• Structures/models for joint work</td>
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<tr>
<td>• Joint recruitment</td>
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<tr>
<td>• Use of new technology</td>
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<tr>
<td>• Procedures for e.g. data sharing</td>
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<tr>
<td>Seek funding from other public sector bodies (Health, Police etc.) to</td>
<td>Medium</td>
<td>Other public sector bodies</td>
<td>Sustainable and transparent funding processes / more people can access advice</td>
</tr>
<tr>
<td>support advice services where clear cost benefits can result</td>
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<tr>
<td>Key public sector bodies work through the DAP to improve commissioning</td>
<td>Medium</td>
<td>Local Authorities and other</td>
<td>Sustainable and transparent funding processes / more people can access advice</td>
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<tr>
<td>processes through co-design and co-production</td>
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<td>public sector bodies</td>
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<tr>
<td>Support sector-wide bids to larger national funders such as Lottery,</td>
<td>Medium</td>
<td>DAP</td>
<td>Sustainable and transparent funding processes / joined up advice services / more</td>
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<tr>
<td>Comic Relief, Children in Need</td>
<td></td>
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<td>people can access advice / value for money</td>
</tr>
<tr>
<td>Develop performance indicators by establishing:</td>
<td>High</td>
<td>CAiD</td>
<td>Joined up advice services</td>
</tr>
<tr>
<td>• Baseline data on services</td>
<td></td>
<td>Other partners in DAP</td>
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<tr>
<td>• Benchmarking</td>
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<tr>
<td>• Common reporting systems</td>
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<tr>
<td>• Use of other data systems e.g. MOSAIC</td>
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<tr>
<td>Provide infrastructure support on:</td>
<td>Medium</td>
<td>CAiD</td>
<td>Joined up advice services / more people can access advice / value for money</td>
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<tr>
<td>• Quality (including achieving appropriate quality marks)</td>
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<td>Other partners in DAP</td>
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<tr>
<td>• Training</td>
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<tr>
<td>• Data sharing protocols</td>
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<td>• Pooling resources</td>
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<tr>
<td>• Opportunities for joint work and sharing back-office functions</td>
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<td>• Governance and legal compliance</td>
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<td>Milestones</td>
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<tr>
<td>Develop ways for advice sector data to inform pan-Dorset strategies and developments</td>
<td>Medium</td>
<td>DAP</td>
<td>Joined up advice services</td>
</tr>
<tr>
<td>Improve client access</td>
<td>High</td>
<td>DAP, Other partners in DAP</td>
<td>End to ‘wrong-door syndrome’ / more people can access advice</td>
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<tr>
<td>- Promote single point of entry to advice</td>
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<td>- Strengthen referral routes</td>
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<tr>
<td>Promote and market Dorset Advice Partnership</td>
<td>Medium</td>
<td>DAP</td>
<td>Joined up advice services / more people can access advice / reduction in people reaching crisis point</td>
</tr>
<tr>
<td>- Internally with partners, fora, other public sector bodies</td>
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<td>- Externally with wider community</td>
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<td>- Provide improved voice for clients</td>
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<td>- Research and campaigns work</td>
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<tr>
<td>Promote to the Public and Professionals</td>
<td>High</td>
<td>DAP Partners</td>
<td>Reduction in people reaching crisis point</td>
</tr>
<tr>
<td>- Information about services</td>
<td>Medium</td>
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<td>- Self-help information</td>
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<td>- Preventative and ‘educational’ help e.g. Financial Capability</td>
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<tr>
<td>Annual Review of:</td>
<td>Medium</td>
<td>DAP</td>
<td>Joined up advice services / more people can access advice / reduction in people reaching crisis point / value for money</td>
</tr>
<tr>
<td>- Progress against targets and performance indicators</td>
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<tr>
<td>- Analysis of advice trends</td>
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<tr>
<td>- ‘Healthcheck’ of the advice sector</td>
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</table>
This Strategy has been produced by an independent consultant Sara Armstrong, working with Caroline Buxton (CAiD Executive Manager). We wish to thank the following for their support:

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All those who were interviewed during June/July 2015.

Laura Cornette, Dorset County Council

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