



the charity for  
your community



**Law Centres Federation**  
Legal action for the community

# Delivering advice together

## Learning from the Advice Plus experience

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

# 1. Introduction

**1.1** This report is a **summary** of the findings and recommendations arising from a survey carried out in June 2012 evaluating the work of Local Advice Networks (LANs), funded by the Big Lottery across England from 2007–12.

**1.2** The **full report** will be available in September and aims to record good practice, facilitate links between LANs, identify challenges commonly faced by LANs and make recommendations for future work. The report was not designed to evaluate any individual LAN.

**1.3** The survey and report was commissioned by Citizens Advice, Advice UK and the Law Centres Federation, with the support of the Big Lottery and carried out by Marion Scott, an independent consultant. The national advice umbrella organisations would like to thank the networks in the South West and the Advice Services Alliance for their initial suggestions concerning a common evaluation of all the LANs.

**1.4** Between 2006 and 2009 the Big Lottery launched two funding streams to support the advice sector. 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). Round 2 (2008/9) had different and more precise criteria as well as specifying that the networks should be “legal” advice networks. The lead agency had to bid with at least one other organisation as a partner. Round 2 funded 39 advice networks across England.

**1.5** The report is based on an analysis of 32 responses<sup>1</sup> from **lead organisations** (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 **partner organisations** are those that were formally named in the bid as a partners. **Member organisations** are all those other organisations included in the LAN.

**1.6** The survey (in two parts, for leads and for partners or members) has generated quantitative and qualitative data that has been analysed to give some statistical data, coupled with insights into the issues raised.

**1.7** In the report the LANs are numbered, rather than named, because anonymity was promised. The 32 LANs represented a wide range of types of network covering all of England.

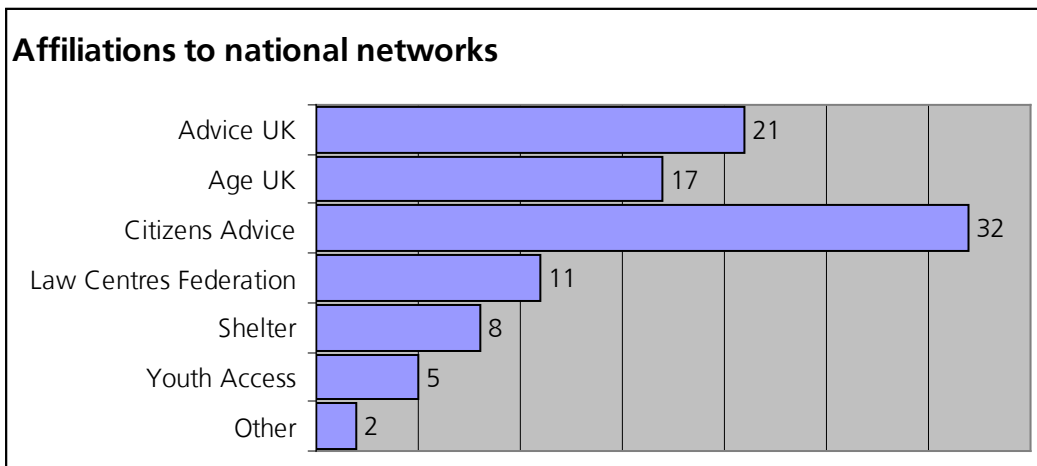
**1.8** Twenty-seven LANs received between £400-500k in total. Four LANs received between £200 and £400K. One received under £100k and was an atypical small partnership in Round 1. Most ran between three and five years. Sixteen (50 per cent) of the LANs reported that they obtained additional funding during the period of the BLF grant.

**1.9** LAN size varied, with members from two to over a hundred.

---

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

## 1.10 LANs were affiliated to a number of national organisations.



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

## 2. Main recommendations and findings

### A. For Local Advice Networks

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. 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.
4. 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.
5. Investment so far in the LANs and their development will be undermined without new or alternative funding beyond the end of Advice Plus.
6. 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.
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 coordination 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 and facilitation, and follow up.

9. 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.
10. 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.
11. 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.
12. 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.
13. 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.
14. LANs could be supported to develop a common approach to data protection.
15. There is still a need for resources for delivery of advice by telephone and email in LANs.
16. 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.
17. 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.
18. 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.
19. 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.
20. 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.
21. More work is needed to understand how to best devise, introduce, implement and sustain common referral systems.
22. 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.
23. 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.
24. LANs can create leverage and improved access to policy makers and strategic planners.

## **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. 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 among their membership.
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 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.

## **3. Issues covered in the main report.**

### **3.1 Structure, management and governance.**

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. 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.

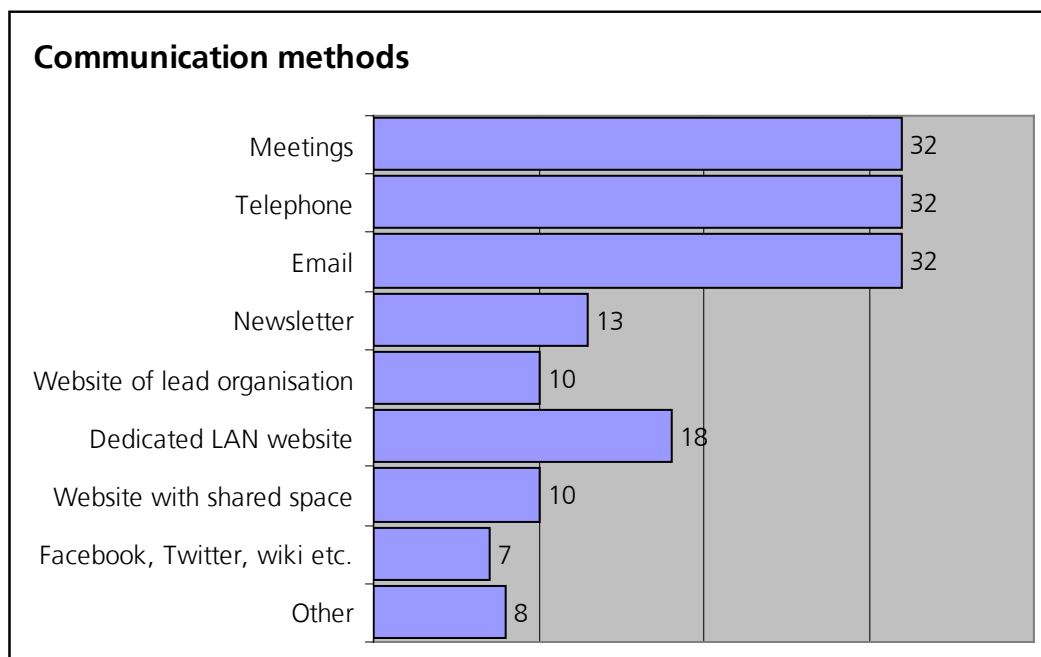
Paid co-ordination of the LANs was widespread and considered essential by most LANs in achieving the planned outcomes and creating capacity and potential for development. LAN leads working for independent boards (and in neutral relationships in relation to a host or fund holder) said or implied that they could offer a view and a more impartial function beyond the vested interested of individual services.

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.

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.

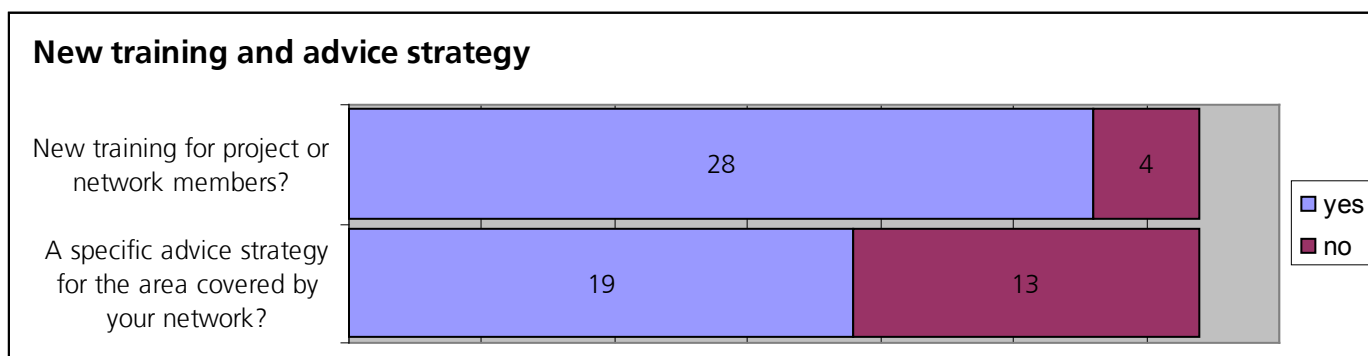
### 3.2 Communication methods

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.



### 3.3 Training and advice strategies

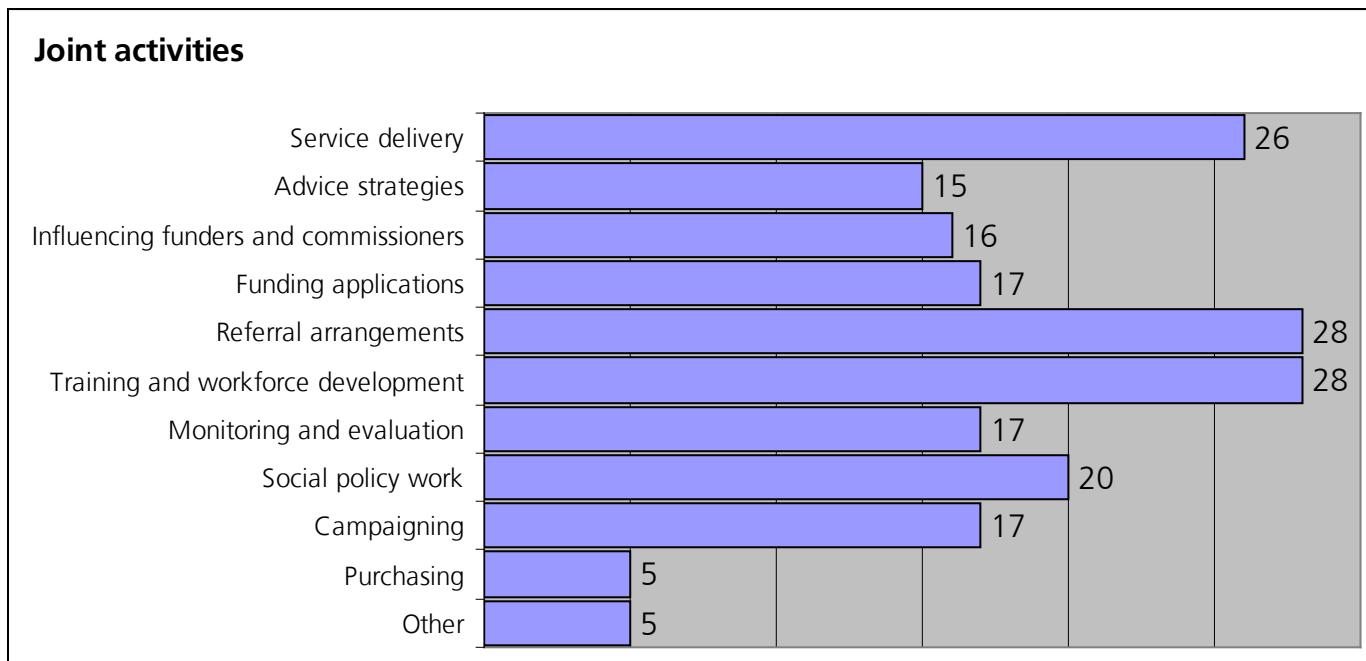
Nearly 90 per cent of the LANs developed new training. LANs delivered a large amount and very varied training. Area wide advice strategies had a number of functions, as well as ensuring better referrals and better access to advice. They also offered a mechanism which encouraged clarity and helped organisations work together to a common end.



The report outlines in detail the wide range of enhanced access to training and new opportunities for training created by the LANs, including preventative work such as financial capabilities.

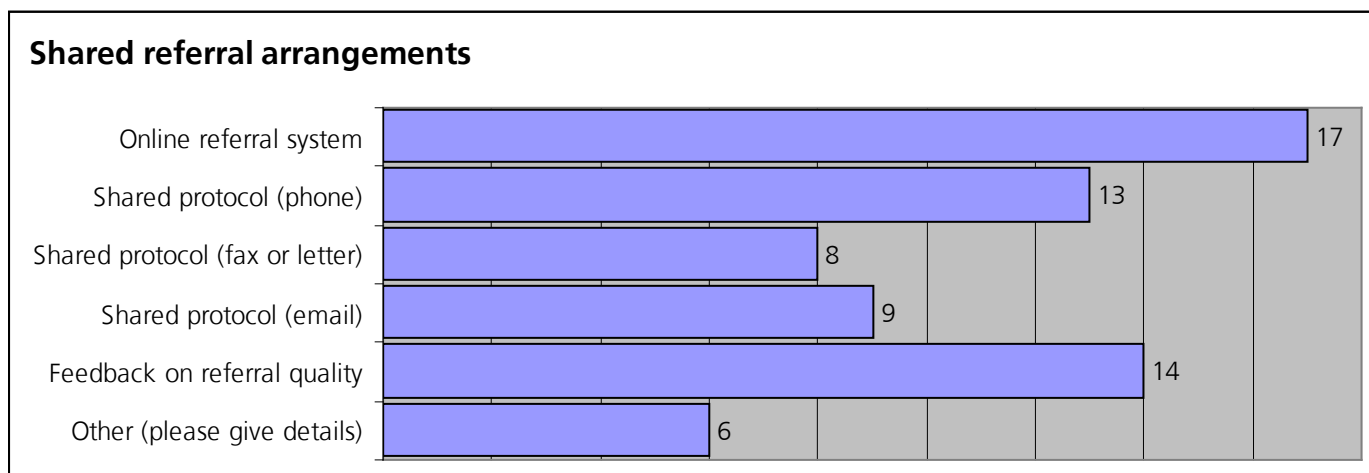
### 3.4 Activities

The main activities in keeping with the BLF Advice Plus focus, were service delivery, referral arrangements, and training and workforce development. Social policy work also featured frequently.



### 3.5 Referral systems

Fifteen LANs were using electronic referral systems, these included Common Referral System (CRS), as in Somerset (by Turnkey), Nellbooker, and Refernet. A further two were using email and one was using fax. Two more LAN were establishing electronic referral systems. Nearly 60 per cent (19) of the LANs should thus have some form of electronic on line referral system in the near future. In addition a range of common referral systems were used.



### 3.6 Levels of engagement

There was a considerable variation in participation, with only one LAN indicating they were overwhelmed with members. 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'. The following table shows LANs according to size of partnership (in this case number of partners and members) with 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%)	

Smaller LANs were almost entirely led by bureaux. Bureaux as partners received a mixed press. Bureau 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.

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.

LANs employed a range of methods and channels to encourage wide engagement and participation, including incentives (financial, for instance payments for attending meetings).

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. 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.

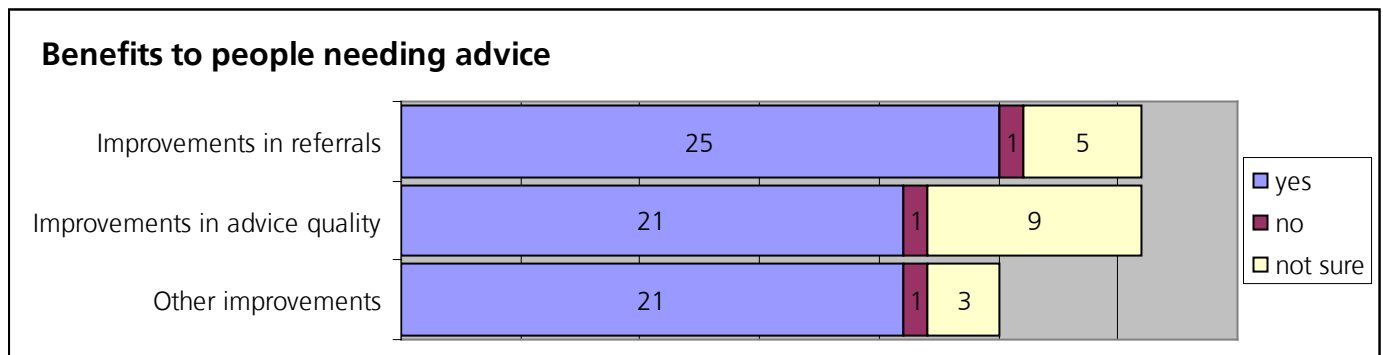
### 3.7 Achievement of outcomes

Almost 63 per cent (20) of the LANs had already, 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.

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.



### 3.8 Benefits to clients



This question from the survey was designed to identify whether LANs<sup>2</sup> thought that advice service users had gained from the funding of the advice network.

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.

There were a range of positive responses from 29 members/partners.

<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

<sup>2</sup> The baseline here is 31.

### 3.9 What counted as success?

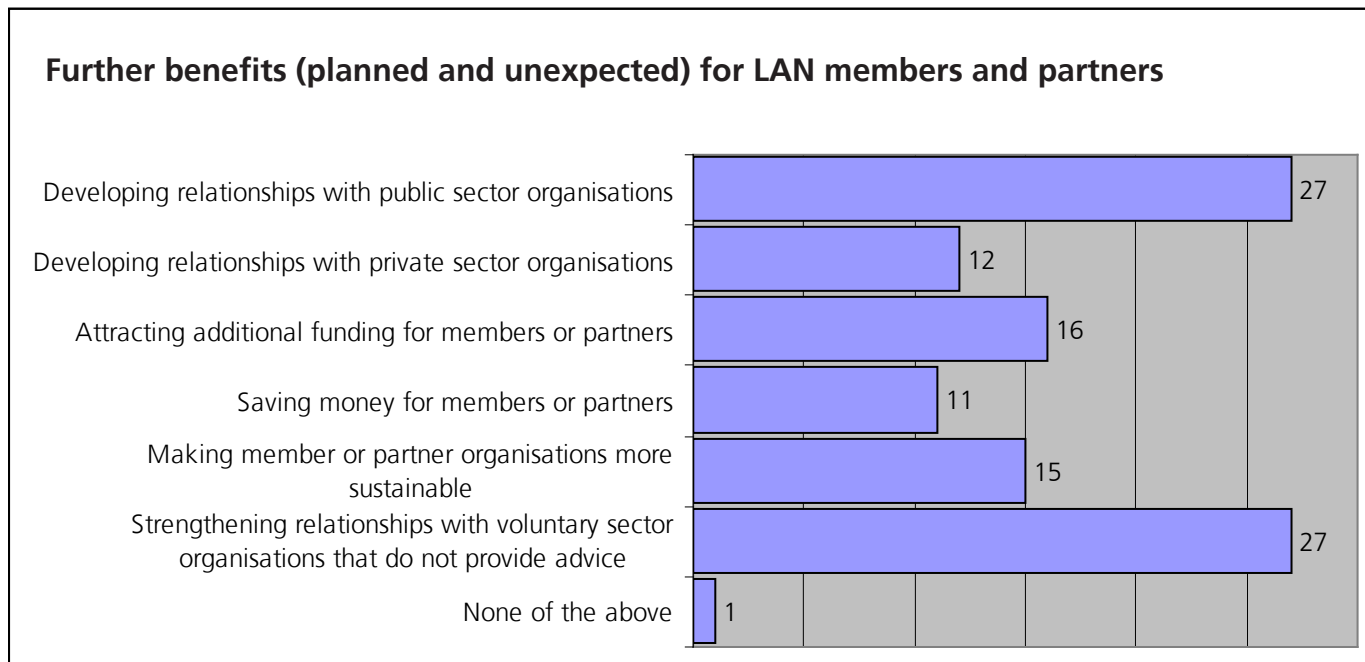
Most LANs said they had met their planned outcomes, several exceeded their targets and some had detailed quantitative information to illustrate their outputs and outcomes. Thirty-one LANs reported ninety-six achievements as displayed below:

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

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.

### 3.10 The benefits of the LAN for 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.



### 3.11 Sustainability of the LANs

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

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. Despite this a number of LANs were hopeful that joint activities would continue.

### 3.12 Other topics

The full report also explores: areas of work the LANs would have liked to have developed more, or felt went “less well”; development of websites; social policy work; competition for funding and how this was managed; how other conflicts were managed; support from the national bodies and more detail of future plans.

## 4. Success factors and challenges

**4.1** As well as recommendations and key findings the full report identifies a wide range of good practice carried out by the LANs that could be duplicated by developing LANs elsewhere.

**4.2** It also summarises the key success factors and some of the main challenges facing the LANs, as well as analysing in detail views from the LAN leads and partners on these issues.

### 4.3 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.

### 4.4 Challenges

1. 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. Most organisations did not have surplus capacity and had to focus on service delivery and meeting targets.
2. 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.
3. Agencies especially small ones needed sufficient capacity and resources to engage and participate fully in LAN and local joint strategic and operational activities.
4. 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.
5. 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.
6. Partnership working is complex and LAN co-ordinators and lead bodies have had to work hard to realise benefits for all partners and members.
7. 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).
8. 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. Partners and members not receiving resources or obvious benefits from a LAN initiative were sometimes less easy to engage.
9. Joint work on quality between organisations even in a partnership required trust and openness and this made some organisations feel vulnerable.
10. Practical matters like geography, good outreach space and ICT, and staff changes all impacted on inclusion or willingness and ability to engage.
11. Involvement by private solicitor firms was sometimes limited by commercial considerations.
12. LAN conflicts sometimes arose over service arrangements not working out or due to administrative requirements and compliance.
13. Some LANs did not always generate a sense of inclusiveness for particular organisations or communities.
14. There appears to be the potential for difficulties between developing LAN wide telephone lines and Citizens Advice AdviceLine.
15. Some LANs experienced problems setting up common referral systems.

16. The changing economic and social context challenged several LANs and restricted their achievements, for example 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.
17. 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.
18. The implementation of the LAN lead role was problematic in a few areas.
19. Co-ordination was identified as pivotal to the success of the LAN but was not considered feasible without funding.
20. 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.
21. Specialist advice will be increasingly needed as legal aid services reduce.
22. Funding is a particular challenge – the lack of funding to continue LAN development is a critical matter – and national bodies are expected to help more.
23. LANs and local organisations perceive a degree of division between the national advice bodies, which they see as unconstructive.

Ends

Final summary 21 July 2012