

Review of Publicly-funded Advice Services in Scotland

Blake Stevenson

The Scottish Government's Advice Services Working Group commissioned Blake Stevenson Ltd. to undertake a review of publicly-funded advice services in Scotland, to support its on-going review of assistance given to organisations.

The focus of this research was limited to Type I and Type II advice¹, and to advice related to welfare, money and consumer advice. However, it was recognised that advice seekers often require advice across multiple and varied issues and therefore the review covered publicly-funded advice given in a range of situations.

Overview of methods

A mixed methodology was applied to collect and analyse quantitative and qualitative data from a range of sources. A literature review was undertaken alongside primary research involving an online survey of advice providers and funders², meetings with key organisations, and telephone interviews with survey respondents.

Context

This review takes place at a time of significant change to public services, which has impacted on the delivery of publicly-funded advice services. The advice sector is broad in scope and a wide range of public policy issues provide context for its work. Legislative changes related to social security and consumer affairs are among the most significant. There is significant evidence that actions coming out of these legislative changes and commitments have impacted on both the number and type of people accessing advice services, and the issues with which they require support.

¹ Type I advice is described in the Scottish National Standards for Information and Advice Providers (the Standards) as being "Active Information, Sign-posting and Explanation". Type II advice is described in the Standards as "Casework".

² The user experience of advice services did not form part of the research.

Key findings from the review

The review considered a large amount of data relating to publicly-funded advice provision in Scotland from which several consistent key messages emerged:

- **The demand for advice is growing**, and will continue to grow as the impact of changes to welfare reform take effect. Reduced household income is leading people who previously would not have required it to seek advice, and the advice being provided is becoming more time-intensive and complex in its nature.
- **Funding for advice is limited**, and is likely to be cut further. Whilst advice providers are aware of this and are taking actions to deliver their services cost-efficiently, significant challenges over their futures remain.
- **One-year spending review cycles within the public sector have had a significant impact** on the ability of the advice sector to plan and staff services, and have resulted in loss of skills and resources.
- **Budget reductions coupled with increasing demand mean a different approach to the funding, development and delivery** of advice services is required. Additionally, the literature suggests that more must be done to promote the added value of advice services in order to protect budgets.
- The literature places an **emphasis on the importance of prevention and early intervention to address some of the issues** associated with increased demand.

There are significant challenges facing the advice sector currently, resulting from an increase in demand and cuts in funding. It is also a time of change in other ways, with new powers being given to Scottish Government to implement legislation, such as consumer advice and social security. These changes will directly impact on the way some advice services are delivered. There is now an opportunity to re-position public investment in advice services to support innovative collaboration across the public sector in a way that furthers wider objectives related to social inclusion and health improvement.

Current approaches to advice provision

Advice provision is currently delivered by a wide range of agencies (with a mix of local and national providers) – most delivering a holistic, person-centred service across the range of advice covered by this research (and beyond), and a smaller number focusing on single issues or individual target groups.

Providers use a range of mechanisms to deliver advice, with most offering a multi-channel approach to delivery. Face-to-face support (including outreach-based) remains common, and is an effective way of supporting clients with complex cases and/or complex personal circumstances. A range of other channels are also used, including email/written support, telephone and web-based support.

Evidence suggests that there is an over-provision of face-to-face support for clients who could access advice through other channels if encouraged and supported. Channel shift is encouraged by the literature, where appropriate, but the literature

recognises the importance of maintaining face-to-face support for those hardest to reach.

Routes for advice provider selection

Routes to advice vary and include referrals between agencies, and self-referral by individuals. The literature and survey feedback suggest that referral routes are being continuously improved and that increased partnerships between organisations will enable these to be further refined.

However, the literature and feedback from providers suggest that current advice provision is not sufficiently visible to clients, and that clients' choice is not as well informed as it could be if they had better awareness of the type and range of services available.

Early intervention and prevention

The available research advocates for an increased emphasis on early intervention and prevention to avoid additional demand being created and clients presenting to advice services at the point of crisis. There is a clear sense from the literature that the level of need for complex support could be reduced by more effective prevention and early intervention work.

Use of new technologies to provide advice

Many organisations are already exploring new ways of delivering advice, and use of new platforms such as social media is becoming more common. The literature and primary research suggest that there is significant potential to grow the extent of advice provided through new technologies, but the sector will require support and funding to ensure this is done effectively.

Approaches to future funding decisions

The literature indicates a need for intelligent, strategic and longer-term funding decisions to be taken in relation to advice provision. Emphasis is placed on a need for greater evidence-based and outcomes-focused funding decisions being taken, and for more joining up in relation to funding decisions across public funders, to ensure quality and avoid duplication.

Collaboration and co-operation

The literature encourages funding providers who are able to demonstrate a collaborative approach to delivery. Whilst partnership working and collaboration is considered key to more effective delivery of services in future, the literature and feedback from providers suggests that the current, highly competitive funding environment acts as an inhibitor to this.

Quality of advice provision

The literature confirms that many of the existing advice providers have a track record of providing high quality advice based on recognised quality standards but advocates for all advice providers to follow good practice and work towards accreditation where appropriate.

Recommendations

The following set of recommendations are grouped by their target audience: policy makers, public funders, and advice providers.

Recommendations for Policy Makers:

Recommendation 1: Advice needs to be considered at policy development stage in line with practice contained within the Funders' Framework.

Recommendation 2: Policy makers to ensure clarity on statutory obligations, and opportunities for considering new ways of meeting these obligations.

Recommendation 3: Policy makers to ensure evidence-based policy decisions.

Recommendation 4: Improved understanding of need related to advice provision to inform policy development.

Recommendation 5: Policy makers to focus on prevention and early intervention measures.

Recommendations for Public Funders:

Recommendation 6: Better understanding of demand to inform future funding decisions.

Recommendation 7: Joined-up decision making to avoid duplication and improve identification of opportunities for collaboration.

Recommendation 8: Funding decisions to focus more on early intervention.

Recommendation 9: Funding decisions to focus more on prevention by supporting interventions which develop capabilities and address areas of low skill.

Recommendation 10: Funders to pro-actively encourage collaboration between organisations, and ensure that the funding environment does not act as an inhibitor to this.

Recommendation 11: Funders to examine funding application and monitoring processes to enable a reduction in the bureaucratic burden associated with multiple reporting arrangements.

Recommendation 12: Funders to work towards achieving more consistent measurement of outcomes using common indicators to enable measurement across service providers

Recommendation 13: Funders to ensure consistent application of Funders' Framework.

Recommendation 14: Funders to ensure outcomes-focused grant agreements become the norm.

Recommendation 15: Funders to continue to gather evidence of good practice that can inform future funding decisions and can be shared across the advice sector.

Recommendation 16: Funders to continue to encourage advice interventions that are embedded across sectors (e.g. involving the Third Sector and the NHS).

Recommendations for Advice Providers:

Recommendation 17: Providers to improve targeting to address unmet need

Recommendation 18: Providers to continually review channels of delivery to ensure best use of resources, for example, ensuring that resources going into face-to-face support are reserved for clients who can benefit most from this type of support.

Recommendation 19: Providers to continue to develop digital channels of advice provision.

Recommendation 20: Providers to collaborate effectively with other advice providers, and co-locate advice services in other settings where appropriate.

Recommendation 21: Providers to ensure greater sharing of lessons learned around successful approaches (and what does not work).

Recommendation 22: Providers to improve visibility of services through improved marketing and awareness raising.

Recommendation 23: Providers to continue to develop and improve referral between services.

Recommendation 24: Providers to ensure provision of high quality advice through working towards advice standards.

Recommendation 25: Providers to ensure improved outcomes data collection to demonstrate impact, and ensure that data can be disaggregated effectively to provide detailed understanding of impact on different client groups.

How to access background or source data

The data collected for this social research publication:

- are available in more detail through Scottish Neighbourhood Statistics
- are available via an alternative route <specify or delete this text>
- may be made available on request, subject to consideration of legal and ethical factors. Please contact socialresearch@gov.scot for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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