
REVIEW OF ADVICE SERVICES: PROGRESS REPORT

1.0 EXECUTIVE SUMMARY

- 1.1 This report updates Members on the implementation of the new arrangements for advice services. At Policy and Resources Committee on the 16th August 2018, a new advice services delivery model was agreed based on mixed economy with core preventative and intervention advice being provided by the Council and a contracted single provider.
- 1.2 Work is progressing well in delivering this redesign, which achieves budget savings of £105,100 over the period 2019/20 and 20/21. The focus has been on defining vulnerability, contractual arrangements relating to the contracts with the current providers and the new contract; resourcing and reduction in posts, and systems.
- 1.3 At Committee in August 2018, concerns were raised regarding the “vulnerability” definition. This has been developed to ensure that all clients have access to a range of services provided either by national and local agencies; the single provider, or the Council. Work is ongoing to provide a triage system to reduce duplication and provide a referral tool.
- 1.4 The procurement process has identified that the contract will be in place before the 31st March 2019 although the start date will be later. The delay is linked to the legal procurement process as the specific time requirements for testing the market-place and the mobilisation period were not factored into the original timeline. The “lead-in” or mobilisation period (which allows measures in place to deliver the contract) will be between April and June 2019, depending on the successful provider. Contingency plans are required, with the best option being to extend the existing contracts with Argyll and Bute Citizens Advice Bureau and Bute Advice Centre on a rolling month basis, subject to their agreement.
- 1.5 Finance – the review will achieve savings of £105,100 over the period 2019/20 and 20/21. The contingency arrangements will incur an unbudgeted cost of £916.17/month for the duration of the mobilisation period although every attempt will be made to minimise the timeframe.

2.0 RECOMMENDATIONS

- 2.1 Members are asked to:
- a. note the progress to date,
 - b. agree with the proposal to extend the existing contracts with the current providers on a monthly rolling basis, subject to their agreement, as a contingency for the mobilisation period
 - c. request a further report to a future Policy and Resources Committee.

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3.0 INTRODUCTION

- 3.1 The Council agreed on the 16th August 2018 to implement a new model for the delivery of core statutory advice services within Argyll and Bute. The new model aims to find capacity with a reducing budget, reduce duplication and ensuring that clients, particularly the vulnerable in our communities, have access to advice.
- 3.2 This report provides Members with an update on the position with the implementation of the new arrangement for advice services relating to debt, welfare rights and homelessness advice.

4.0 RECOMMENDATIONS

- 4.1 Members are asked to
- a. note the progress to date,
 - b. agree with the proposal to extend the existing contracts with the current providers on a monthly rolling basis, subject to their agreement, as a contingency for the mobilisation period
 - c. request a further report to a future Policy and Resources Committee.

5.0 DECISION OF POLICY AND RESOURCES COMMITTEE

- 5.1 The Policy and Resources Committee on the 16th August 2018 made the following decision and requested that a progress report on the delivery of the mixed economy model.
1. Approved the new model and implementation of the new arrangements for advice services of mixed economy and support to a single advice provider, commencing on 1 April 2019.
 2. Agreed that the focus of Council activity should be on the vulnerable and acknowledged the critical role for the Health and Social Care Partnership in delivering this model.
 3. Agreed the new Governance arrangements and the changing remit and name of the Welfare Reform Working Group.
 4. Approved the “no-cost” option for affordable credit.
 5. Endorsed the development of the Council’s website to provide a “single landing page” for advice services which can signpost clients to appropriate services, provide links to national and local advice via other website, and highlight issues relating to advice services across Argyll and Bute.

6.0 PROGRESS REPORT

- 6.1 Good progress is being made to implement the new arrangements for advice services. Key areas to highlight are:
- 1) The Council's Procurement Team are developing the new contract documentation. The contract and tender process for provision of single external provider will be an open fixed price contract through Public Procurement Scotland. A detailed timetable has been developed and had identified that the new contract will not be in place for the 1st April 2019, as intended. Members should note that the contract will be agreed before the 31st March 2019 at the latest, but there will be a mobilisation period ranging from 1 to 3 months depending on the successful provider.
 - 2) Formal meetings have been held with Argyll and Bute Citizens Advice Bureau and Bute Advice Centre to advise of new arrangements and that the current contracts will not be renewed after the 31st March 2019.
 - 3) Definitions of vulnerable clients being revised to achieve a definition and service design which meets Committee decisions.
 - 4) There have been a series of meetings with Debt Counselling and Welfare Rights employees to discuss redesign and the implications to them, including the loss of 2 FTE posts over the next 2 years. Further meetings to take place regarding a redesign of services.
 - 5) The Council's Human Resources and Organisation Development team are aware of and are advising on the reduction of post and possible voluntary/compulsory redundancy implications.
 - 6) Progressing the General Data Protection Requirements (GDPR) issues relating to Argyll and Bute Advice Network software issues. The aim is to ensure that the ATLAS system and members are GDPR compliant and this will support us in attracting new members, including health and social care partnership. There is a risk that some members will be suspended from using the on-line system until they can demonstrate that they are GDPR compliant.
 - 7) Initial discussions have been held with the Integrated Health and Social Care Partnership regarding their participation in the new arrangements.
 - 8) There has been initial discussion regarding governance arrangements with the Welfare Reform Working Group to develop a wider remit.
- 6.2 The vulnerability definition has been reviewed to ensure that all clients will have access to appropriate advice. This will be critical in determining the most appropriate advice agency who can deal with their welfare rights/debt or homelessness issues. The model is designed to direct early intervention and promotional work to national advice agencies; to the single provider to provide preventative and intervention advice service, and to the Council for complex intervention for the most vulnerable.
- 6.3 The "traffic light system of vulnerability" produced by the Money Advice Trust and University of Bristol, provides a model which the Council can adapt to meet our requirements.

The model is detailed in appendix 1 of this report, and this has been adapted for our use as follows:

Category of client	Definition	Advice service provider
Potentially Vulnerable	Client is able to make informed decisions and is not at risk of detriment due to their situation	National advice agencies
Vulnerable	Client is in a situation where they are more likely to experience harm, loss or disadvantage than other consumers	Single provider under contract
Particularly vulnerable	Client is currently suffering detriment and at a greater heightened risk.	Council/single provider under contract

A triage system is being developed to support this definition. This will identify clients who will fall within these groups and indicators. For example,

- Particularly vulnerable will include those referred by social work or mental health services, clients facing eviction, bankruptcy or loss of home
- Vulnerable will be those clients who require more support and are in detriment
- Potentially vulnerable or others will be clients who can self-help with the right intervention, or in need of hand-holding

This will ensure that all clients will have access to advice from either national advice agencies, voluntary and local advice agencies, the single provider contracted by the Council, or the Councils specialist team (debt counselling, welfare rights and homelessness).

- 6.4 Council support to advice services is a significant changes in the new model with a move from two providers providing general advice to a single provider delivering specific advice across the whole of Argyll and Bute. The aim was to have the contract in place by the 1st April 2019 when the existing contracts end.

The procurement process has identified that this timescale is not achievable. The contract will be in place before the 31st March 2019 although the start date will be delayed. The Councils Procurement Team have confirmed that there is a need to build-in sufficient time to identify prospective providers, as well as a “lead-in” or “mobilisation period” which allows the successful provider to prepare for the “go-live date”. This, together with having to review the vulnerability model for the specification, has resulted in this delay.

- 6.5 The projected start date will be between April and June 2019, depending on the needs of the successful advice agency. As assessment of mobilisation plans will be included within the tender assessment/evaluation criteria to minimise the delay so far as is reasonably practicable.
- 6.6 Contingency plans will be required to ensure that clients are not placed in detriment as a result. The best option is to extend the existing contracts with Argyll and Bute Citizens Advice Bureau and Bute Advice Centre on a rolling month basis, subject to their agreement. This would ensure that clients can continue to access advice services and are not disadvantaged by these circumstances.
- 6.7 Arrangements are in place to take forward a range of other actions necessary to implement the new model. This includes securing support for Health and Social Care Partnership; developing a single advice page on the Councils website; implementing debt

advice systems, and governance arrangements.

7.0 FINANCIAL IMPLICATIONS

- 7.1 The review is designed to meet the Council's savings target of £105,100. Given the likely delay in the contract coming into effect, the contingency arrangements for the mobilisation period, will have an adverse impact on the budget.

In extending the current contracts on a monthly rolling basis, this will incur a costs of £5312/month, whereby the revised 2019/20 budget (after the saving of £11,000 has been made) equates to £4395.33/month (£52,750 annually). The contingency arrangements will incur an unbudgeted cost of £916.17/month for the duration of the mobilisation period although every attempt will be made to minimise these costs.

8.0 CONCLUSIONS

- 8.1 Good progress is being made to implement the new advice services mixed economy model. There will be a delay in the new contract going "live" but this will be minimised as much as possible through the procurement process and mobilisation discussions with the successful provider.

9.0 IMPLICATIONS

9.1 Policy	Dovetails with corporate and community planning priorities and will be embedded therein
9.2 Financial	Savings target may be reduced depending on length of mobilisation period
9.3 Legal	None
9.4 HR	Loss of Council posts.
9.5 Equalities/Fairer Scotland Duty	No adverse impact although positive target on vulnerable clients
9.6 Socio-economic	Positive as directly supports vulnerable and other clients
9.7 Risk	<ul style="list-style-type: none">• Impact of Universal Credit roll-out to Argyll & Bute may significantly increase demand for advice services resulting in unmet demand for both statutory and non-statutory services• That there will be no interest in contract by external provider
9.8 Customer Service	None at this stage

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Appendix I	Bristol University/Money Advice Trust: Vulnerability: a guide to advice agencies
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