

# **Report of the Strategic Director of Health and Wellbeing to the meeting of the Shipley Area Committee to be held on March 29<sup>th</sup> 2017**

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**Subject: Welfare Advice Services in Bradford District**

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## **Summary statement:**

The following report outlines the new approach to the delivery of welfare advice services across the district. It includes the details of commissioning processes employed; new service expectations; who the providers are; the transformation of access routes and the intention to raise service quality.

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Strategic Director of Health and Wellbeing  
Bev Maybury

**Portfolio: Health and Wellbeing**  
**Cllr Val Slater**

Report Contact: Sarah Possingham /Julie Robinson-Joyce  
Phone: (01274) 431319/434143  
E-mail: [sarah.possingham@bradford.gov.uk](mailto:sarah.possingham@bradford.gov.uk)  
[julie.robinson-joyce@bradford.gov.uk](mailto:julie.robinson-joyce@bradford.gov.uk)

**Overview and Scrutiny Area:-**  
**Corporate**

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## **1. SUMMARY**

The purpose of the report is to update the Area Committee on the outcome of the recent commissioning programme managed by the Council for the delivery of district wide welfare advice services.

It includes details of the new approach to Welfare Advice; the commissioning and procurement processes employed; who the successful bidders are and a description of the services to be delivered.

## **2. BACKGROUND**

### ***Finance***

The Council funded welfare advice sector has not been through a formal review and commissioning process in recent years nor had any reductions been made to the budget for services until 2015/16.

The budget in 2014/15 was approximately £1.7 million; managed by the then Adult and Community Services (A&CS). This was supplemented with a further £2 million from Public Health (PH) to reach a composite budget level in 2015/16 of approximately £3.7million.

At this time these funds grant aided 17 different organisations delivering a wide range of generalist and specialist welfare advice services. They also supported an increase in outreach based advice sessions. Extending access into a large number of 'hosts' sites' including GP surgeries; community centres; children's' centres; mental health and drug and alcohol services etc.

The Council approved a reduction in funding for advice services of £1million pounds in the budget set in 2015/2016. As a result when existing providers had their contracts extended in March 2016 to accommodate procurement processes a reduction of 9.2% was applied across all existing grant agreements. In addition the new contracts reflect the new funding level thereby completing the expected £1million savings.

### ***Review***

In 2012/13 a decision was taken to review Council funded welfare advice provision across the district. This was prompted by the following;

- The use of grant agreements to manage the services in some instances were outside LA standing orders
- The 'market' for these services had not been formally tested
- There were concerns regarding the duplication of services
- Reforms planned in welfare benefits indicated the need for new service approach(es)
- No formal commissioning programme had been run to identify the base line services for 5 years
- Services had not been evaluated in relation to value for money (VFM) for 5 years
- Given the year on year reduction to the Council's grant funding until 2020 the budget level was unlikely to be maintained.

### ***Evaluation***

To start the review, an evaluation of existing services was carried out by a multi-disciplinary Project team made up of officers from PH, A&CS and the then Strategic Support services. There was additional input from two speciality registrars based in PH and key departments such as Revenues and Benefits (Revs and Bens) and Housing.

This involved direct 'observations' of advice sessions as they were being conducted and follow up interviews with prospective 'clients' and agencies. Care was taken to ensure all providers were part of this and that the final analysis utilised a robust research technique to identify the main outcomes. This set a clear 'baseline' for understanding the use made of welfare advice services, the experience of people accessing them and the stresses within service delivery which impacted on providers and final service outcomes.

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The initial 'findings' report from this was launched at an event with providers and stakeholders in attendance; chaired by the then Portfolio holder from Council's Cabinet.

To supplement the observational findings; stakeholders were asked to contribute their views via questionnaires. These were split into groups; providers; referral agencies; partners (such as Revs and Bens/Dept. of Work and Pensions-DWP); outreach 'host agencies and GPs specifically; strategic agencies and other support providers. The analysis of these was undertaken in a similar academic framework to that used for the observational records, ensuring a consistent approach underpinned the final review outcomes. (Link in background documents to final [evaluation report](#))

A formal epidemiological needs analysis was conducted by one of the two speciality registrars based in PH. (See link in background documents to [published report](#))  
The findings of all the above were used to inform the commissioning programme and the new service specifications.

### ***Commissioning Programme***

As part of the commissioning programme two market development events were organised for prospective providers. The first one signalled the Council's intention to commission services and gave a basic outline of welfare advice needs and the possible budget available. It was well attended and gave structured time for providers to ask questions; input into service needs and future directions.

The second event was more focussed and offered specific information on the Council's intention to procure services. It also incorporated time for individual meetings, structured through a script/questionnaire, with providers and/or groups of providers to speak to officers regarding any barriers and/or opportunities which they could foresee in commissioning processes.

This event was well attended with clear messages from the provider sector; in particular the need to clarify what 'lots' might be included in the procurement. This was responded to by publishing early a formal PIN notice which specified lot numbers (5) and basic service outlines.

In addition, 'tender ready' training was organised jointly with colleagues from the Commercial Team. This offered practical help towards completing Council tender documents, including an opportunity to 'assess' and improve a bid. Again this was well attended by advice providers.

Due to the significance of welfare advice services and the part they have to play in supporting vulnerable and destitute householders, advice and direction was sought from senior officers and key elected members throughout the commissioning process.

### ***Service Specifications and Lots***

Information received during the review indicated that the following were important for the delivery of effective welfare advice services;

- Locality and city/town centre based – with access extended through outreach sessions in other venues
- Well trained staff who have easy and functional access to appropriate equipment & IT
- Community language skills and cultural understanding
- Warm and welcoming venues; both fixed and sessional; with private interview facilities
- Reductions in repeat presentations (both from staff and service users' perspectives)
- Better use of new media and telephones for access-extension to internet and SMS options
- Out of hours access options
- Reduction in referrals on to other advice services - all staff should be able to deliver welfare & debt advice
- Better, more effective case recording systems

- Formal partnerships with support organisations; food banks; supported housing; community facilities etc
- Better 'self-care/self-help' options
- Financial literacy and support to access bank accounts
- Retention and sharing of expertise across providers
- Consistent approach
- Local knowledge and expertise

Taking into account the above and planned budget reductions, service specifications were drawn up which incorporated a service transformational process. These would require the sector to work together once contracts were awarded to improve the customer journey, share knowledge and skills and develop joint working to improve the sustainability of the sector.

To make the procurement process accessible to the maximum number of providers the tender was broken down into 5 separate lots. These were;

1. Area based lots; 4 separate lots; one each for Bradford East; Bradford West; Bradford South and a combined lot for Shipley and Keighley to cover Airedale. These specified the need to deliver high quality advice across the areas of benefits, debt, housing, employment and immigration
2. One specialist lot; with a focus on complex and continuing health conditions to provide cover across the whole of the district.

(See link in background documents- [service specifications](#) )

To strengthen and maintain diversity in the provider sector 'bidding' into these opportunities was restricted to a maximum number of three services per organisation. This encouraged more providers to consider the opportunity.

### ***Procurement***

The tender opportunities were advertised on the Council's electronic tendering systems -Yortender on the 24<sup>th</sup> June 2016 with a closing date for completed submissions of 17<sup>th</sup> August 2016.

The Pre-Qualification Questions (PQQ) were incorporated into the main tender thereby streamlining processes for interested parties.

In all 7 completed tenders were received from organisations already providing services in the district. Significant numbers of the tenders were multi-agency in nature, including sub-contracting and partnering arrangements with other providers.

The evaluation of received tenders was conducted in two parts; a financial and PQQ assessment completed by colleagues in finance and a panel marking system for the questions submitted by bidders. The outcome of which allowed the council to appoint providers to all 5 of the contracts. In the case of one of the services, 'South Area locality based welfare advice; a final clarification and presentation interview was held by the panel to complete the scoring processes.

## **3. OTHER CONSIDERATIONS**

### ***Service Transformation***

An outcome of the service review & evaluation programme was the recognition that change was required across the sector. In order to facilitate better access for service users there was a need to introduce new triage systems; reducing waiting times; resolving simple queries quicker; extending services via new methods of delivery including media options - such as instant messaging and web chat; strengthen; support cross sector partnerships etc. Taking forward this change it was hoped that this would also help to build support between the advice providers and their staff; increasing opportunities for joint working to address common issues and to improve morale in a sector undergoing large scale change.

To reflect the above, the contracts issued were 'transformational' and outlined the change processes expected over the next 4 years. This will be captured through routine performance

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management requirements along with the service usage figures – to demonstrate outcomes as well as outputs.

### ***Implementation***

New service contracts commenced on the 16<sup>th</sup> January 2017. Council officers held regular meetings with providers during the implementation period; providers submitted and worked through formal implementation plans. Lead providers have now managed the initial transition process; capturing existing client details, managing any TUPE arrangements where these apply and taking on the existing services and their case loads as smoothly as possible.

A small group made up of these new providers and lead commissioning officers now meets monthly to manage the transformational changes required in the new contracts. This group also creates a positive platform for sharing good practice including improved monitoring and addressing mutual concerns across the providers as they begin to work more co-operatively. The Council remains an active part of this group and will continue to do so as service changes begin to embed.

### ***Poverty Review***

The Corporate Overview and Scrutiny (O&S) Committee carried out a poverty review in 2014/15 which included testimony by welfare advice providers amongst others. The resulting report has now been presented back to the Committee for comments and outcome monitoring. New welfare advice providers are expected to be part of these processes and are important to ensuring that vulnerable households receive appropriate support relating to welfare benefits and/or debt in a timely manner.

### ***Communication strategy***

Providers are working with the Council's media department to get information out to referrers; stakeholder; elected members and partners about the changes taking place. This includes who the new providers are; where they will be operating and how to get in touch. This was late being produced and it is acknowledged that better, timelier communication is required in the future as the services change and progress.

## **4. OPTIONS**

- To acknowledge this report; welcoming the work carried out to identify new service needs and subsequently new providers
- To welcome new providers, strengthen relationships and work with them to support vulnerable householders in the areas
- To provide feedback to officers and providers on implementation and change issues as they arise

## **5. FINANCIAL & RESOURCE APPRAISAL**

The budget for advice across the district is approximately £2.7 million; this year's budget proposals indicate that this will be subject to a future review in 2019/20/21

The transformational nature of the contracts issued and the fundamental changes expected in working practices across welfare advice services require support and guidance from the Council. It is likely therefore that officer input from Health and Well-being will be required throughout the remaining life of the contract.

## **6. RISK MANAGEMENT AND GOVERNANCE ISSUES**

A partnership group which includes Providers and Council lead officers has been established and meets monthly to develop joint working. In addition formal contract management arrangements are in place. Providers are accountable for their implementation and change plans as part of contract conditions.

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The Council is committed to supporting service change and will continue to work alongside providers to support these processes and mitigate against risks as they arise.

The provision and development of welfare advice services is a key aspect of the poverty review and will be reflected as part of the future key actions process.

## **7. LEGAL APPRAISAL**

It is a legal requirement for Local Authorities to support access to welfare & debt advice and other advice based services. This is particularly pertinent in relation to the Health and Social Care Act and Housing/Homelessness acts. In both cases there is a need to ensure fair access to services and demonstrate that advice and care is accessible to those not eligible for direct support.

## **8. OTHER IMPLICATIONS**

N/A

### **8.1 EQUALITY & DIVERSITY**

Welfare advice is accessed by a wide range of disadvantaged groups of people; those in poverty, people from black and minority ethnic groups; women and/or lone parents etc. As part of the new commissions a separate contract has been awarded for services aimed at people with continuing and complex health conditions which includes those with disabilities and/or mental health problems.

In addition to the above it is a stipulation from the new service specifications that service are delivered within an equalities framework; with appropriate language speakers and staff who can appreciate and acknowledge the cultural needs of the populations they serve.

### **8.2 SUSTAINABILITY IMPLICATIONS**

The contracts have been issued on a 4 plus one year basis.

### **8.3 GREENHOUSE GAS EMISSIONS IMPACTS**

It is stipulated that services must be easily accessed via public transport; acknowledging that those on low incomes quite often rely on public transport.

During the service review it was found that not all existing office bases have the most appropriate facilities for advice clients. The contract specification outlined what is expected in the future which includes adequate heating; warm welcoming atmosphere; access to private interview rooms; better use of internet based services etc.

Where necessary this may result in fixed office and/or sessional based service closures, reducing overall the number of buildings this contract supports.

### **8.4 COMMUNITY SAFETY IMPLICATIONS**

Housing and welfare advice helps to stabilise householders; families and single people alike. Evidence from programmes aimed at reducing repeat offending show that early intervention for those released from prison; access to the right benefits and housing can dramatically change the likelihood of re-offending in the future. This is a similar experience for those tackling drugs and/or alcohol misuse and people faced with partner violence and abuse.

### **8.5 HUMAN RIGHTS ACT**

Advice services assist families and/or individuals to access a range of 'entitlements' under legislation; this includes housing; welfare benefits; support services and social care; immigration status etc. All of these underpin rights enshrined within the Human Rights act.

### **8.6 TRADE UNION**

The nature of the funding reductions means that inevitably there are likely to be staffing changes across the providers. The implementation process included identifying and managing TUPE implications and/or the possibility of redundancies and possible changes to pay and conditions in the longer term.

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## **8.7 WARD IMPLICATIONS**

4 of the 5 contracts issued are based on Ward boundaries and are expected to service those areas in particular.

## **8.8 AREA COMMITTEE WARD PLAN IMPLICATIONS (for reports to Area Committees only)**

As above, services are divided on a ward and area basis. Strong working partnerships will be vital in ensuring that service users can and do use the provider they most know and trust; irrespective of where these are located.

## **9. NOT FOR PUBLICATION DOCUMENTS**

N/A

## **10. RECOMMENDATIONS**

1. To accept this report and its contents; allowing time for the new services to embed and commence their change programmes.
2. To encourage services to work closely with their ward members and to ensure service access data is up to date for a wide range of stakeholders and referrers

## **11. APPENDICES**

**Appendix 1** Area specific provider information

## **12. BACKGROUND DOCUMENTS**

1. Welfare Advice service evaluation report  
[evaluation report](#)
2. Welfare Advice Epidemiological Needs Analysis  
[published report](#)
3. Welfare Advice invitation to tender  
[service specifications](#)