

The concept and role of local advice forums

Introduction- AdviceUK's forum strategy

A local advice forum seeks to give local advice centres a collective, inclusive voice and to provide mutual support and capacity building, as well as influencing the future of advice services.

This briefing is designed as an introduction to advice forums for those involved or interested in the work that advice forums do. It is also designed to help avoid the common problems that many forums face, both in their early stages and at key stages in their development.

Whether you are setting up a new forum, joining an established forum, reviewing a forum that you have been involved with for some time, speaking at a forum meeting, funding a forum or a key partner for the future of a forum this briefing will provide you with useful information. It explores the following:

1. The reasons behind setting up an advice forum
2. AdviceUK's concept of forum working in the advice sector
3. The different roles an advice forum can play
4. What makes a forum succeed?

1. Why have a forum strategy?

A forum strategy is useful to deal with:

1. High level of demand for services:

Many centres are unable to deal with the level of demand for their advice services. Working together with other local agencies to analyse this problem and consider ways forward is worth pursuing.

2. Problems with referrals: Centres are often unaware of how and to whom clients should be referred, if the centre is unable to assist. Working more closely with local agencies helps to increase knowledge of other advice providers.

3. Insufficient funding: A lack of funding as well as instability in funding for the advice sector is a continuing problem and a fundamental concern for most centres. A forum has the potential to play a significant role in this area, providing mutual support and discussing good practice. A forum could also provide opportunities to establish partnership work and avoid duplicating the work of other centres, both of which are looked favorably upon by funders.

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4. Unaffordable training: The importance of training and keeping up to date with changes to legislation and good practice is clear – the main barrier to training tends to be cost. Working together to share costs is a potential solution to this issue.

5. Lack of information: Alongside training, access to accurate and up to date information resources is crucial for any advice centre. Many centres are not using manuals, websites and other resources that could help ensure their advice was up to date and accurate.

6. Low morale and isolation: A key concern for AdviceUK is the effect that many of these issues have on staff morale. Key workers often feel isolated and under pressure with work targets. A forum can offer an opportunity to reduce isolation by meeting others and also discuss some of the potential solutions to these issues. Such support can also help to retain experienced staff in the sector.

Co-ordinating our forum strategy with Community Legal Advice: The forum strategy was developed at a time when the Community Legal Advice (formerly Community Legal Service) was in its early stages of development and Community Legal Service Partnerships (CLSPs) were being established. The forum strategy

sought to link with this work where appropriate.

Whilst CLSPs promised a coordinated funding and planning role for the whole advice sector, advice forums were designed to have a different remit. Forums aimed to focus on engaging with, and building the capacity of, the voluntary advice sector, with particular attention to marginalised and small advice providers. This was in recognition of the particular issues that these groups face.

Since 2000 Community Legal Advice has seen many changes. CLSPs in particular have faced problems in implementing effective referral systems and engaging effectively with the wider advice sector, particularly smaller advice providers and those led by, and serving, marginalized groups. These difficulties have been acknowledged both by the Legal Services Commission (LSC) and by the advice sector. The role of local advice forums in successfully building relationships between advice providers and building advice providers capacity has been acknowledged by CLSPs, local authorities and the LSC, as well as by advice providers themselves.

Whilst the future strategy of Community Legal Advice suggests less emphasis upon CLSPs, there will nevertheless continue to be a need to include and consult a diverse range of advice providers in developing

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effective strategies to meet the needs of those that Community Legal Advice states it prioritises, i.e. those that for which without its support access to justice might be impossible.

In addition, other key stakeholders such as Local Strategic Partnerships and local authorities will continue to benefit from a clear point of strategic engagement with an inclusive range of advice providers.

2. Our concept of advice forums

Advice forums aim to bring groups together, to assist networking and referrals and to provide advice specific support so that groups can provide quality advice and keep up to date with changes in legislation.

Within this broad definition advice forums come in many different shapes and sizes but are informed by a number of key principles.

• Inclusion

A core principle of AdviceUK's forum model is that forums must be inclusive of all voluntary sector advice centres in the area. Particular attention is paid to small advice agencies working with marginalised client groups, given the fact that many other partnerships by their very nature are inaccessible to these groups.

Furthermore, engagement with these groups is crucial since they often represent the most socially excluded communities. In the early stages of forum development some partners felt that only those that had achieved the Quality Mark should be engaged in the forum. This kind of approach does not take into consideration the significant difficulties that some agencies face when achieving a quality standard for the first time.

Furthermore, by engaging all advice agencies in a forum knowledge of good practice will be increased alongside knowledge of available support.

• Responsiveness to local circumstances and needs

One of the main principles of advice forums that AdviceUK has established is that they should reflect the needs of local advice agencies and the fundamental issues in the particular local area.

For example, in a local authority that has recently faced funding cuts a forum is likely to focus on funding issues initially. Funding is often high on the agenda in the initial stages of forum work reflecting the funding issues advice agencies face. In another local authority agencies may identify problems with the housing benefit administration as a common issue that is significantly affecting advisers across the

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board. This would then be a priority for an initial forum meeting.

- **Direct benefits to members**

Forums are set up principally to deliver to their members. The information, good practice, networking opportunities and presentations that take place at forum meetings must meet the needs of forum members in order to be successful. At each meeting there must be some agenda items that are relevant to each advice centre so that each member can benefit.

- **Complementary – not duplicating**

Ensuring that forums are not duplicating the work of other partnerships and have a clear role is crucial.

For example, whilst funding is a key issue for many forums in some areas, a local support agency has a very developed funding support service in which advice agencies feel fully engaged. In this case, whilst funding would still be an issue from an advice specific angle, detailed discussion of funding issues would not carry the same priority.

Some local authorities have groups or liaison meetings focusing on specific advice issues: debt, welfare benefits, housing benefit etc.

Where such groups exist, an advice forum needs to ensure that it is not duplicating this work and that appropriate links are

established with such bodies. Even in local authorities where local initiative has led to the establishment of such groups a forum has been shown to provide added value by providing opportunities to explore the links between different advice issues given the fact that an advice forum has a broad remit. Such opportunities are particularly important when developing social policy work.

- **Independent**

The concept of independence is important. It refers to the fact that an advice forum is set up to be led by its membership which is, in the main, the not for profit advice sector.

While the engagement of the council, statutory agencies and solicitors is crucial to the success of the advice forum, this clarity is important – without such clarity there is a danger of duplicating the role and work of the CLSPs.

Furthermore, as well as discussing issues with the local authority within an advice forum context, advice agencies need to explore these issues together before they can effectively approach decision makers. It is important for clients, statutory bodies and the advice sector that advice agencies are enabled to fulfill one of their core purposes, to challenge decision makers in order to come to a successful and fair resolution for clients.

The not for profit advice sector is hugely significant to the most marginalised communities. Many small agencies are holistic providers (providing a range of services to meet the needs of their client group, of which advice is just one service). Nevertheless, these agencies need effective mechanisms to engage them and this can be achieved by delivering something they value because it is led by their needs. Broad partnerships such as the CLSP are unlikely to be able to achieve this. It is therefore crucial that the forum is clearly led by voluntary sector agencies. In this way a forum provides an opportunity to reach excluded communities.

3. What role can advice forums play in the advice sector?

The role of advice forums varies considerably from council to council according to local needs. This section sets out some of the areas which advice forums can focus on:

A collective voice on key social policy issues: Forums provide an opportunity to discuss key social policy issues, for example a rise in homeless young people. If an issue of local significance is identified, forums also provide opportunities to work together to collect evidence and present a case to key decision makers. Working in this way

means that individual agencies do not have to stand out alone. This can be daunting, particularly if an agency is presenting a case to an organisation that is its key funder.

Furthermore, working together ensures that there is a broader perspective about the specific issue and more rigorous testing of the appropriate solutions.

Working together on social policy issues can help to identify maladministration, whether it be in the Benefits Agency or the Housing Benefit Department, and work to get problems that affect clients dealt with at source. Some forums have established ongoing links with Benefits Liaison teams and/or the Homeless Persons Unit. This work can also help to raise the profile of advice at a strategic level.

Building relationships and trust: A forum enables advisers to make local contacts with workers from other centres for mutual support, referral and sharing good practice. This is often facilitated through an information exchange slot in the agenda and time before and after each meeting for networking. More and better referrals result, since referring to a named person on the basis of personal contact will tend to be more effective than referring to an unknown agency listed in a directory.

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Providing quality advice: A forum can act as a focal point for support, training, good practice guidance and materials around quality standards and other approaches to promoting quality.

As well as sessions focused on gaining a particular quality standard, informal conversation between centres about these issues are key for learning and to provide mutual support. Presentations from agencies that have achieved and worked with a quality standard are very effective, since they provide groups with local first hand experience of the issues.

Forum members may also alert others to changes in legislation so that advice is up to date; advice specialists may offer other support, such as mentoring to forum members.

Delivering capacity building:

Forums are an important point of engagement for the delivery of capacity building focused on good practice for advice centres. For example, forums provide regulatory agencies - such as the Office for the Immigration Services Commissioner (OISC) - with a means of spreading knowledge about their practices and requirements. For second tier agencies and others delivering support services they provide a cost effective way to deliver information and training to advice centres.

Sharing costs: There is significant potential in every forum for cost sharing, for example arranging in-house training tailored to needs of agencies at a much reduced cost, or sharing equipment, whether it be an overhead projector or meeting space. A forum provides an environment where innovative ways of working together to respond to collective needs can be explored.

Monitoring new developments in the local authority: On an ongoing basis, forums discuss and monitor significant issues and developments in their local area. As well as identifying these as social policy concerns they can also flag up gaps in provision. This can in turn inform the CLSP and other local agencies, for example, the Local Strategic Partnership, council, and Regional Legal Services Committee, in order that hidden advice needs are recognised.

There are many other advantages of cooperation between advice agencies and each of the forums we have worked with has established a programme of meetings and work that is unique.

4. How can advice forums be most successful?

Common problems

As identified at the beginning of this briefing the advice sector faces many

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challenges. In this environment it can be difficult to set up an effective forum. Many agencies – particularly black and minority ethnic and refugee groups - are already asked to participate in a number of different partnerships and forums. They may naturally question whether an advice forum is simply duplicating other work. Agencies are generally wary of a talking shop environment, which seems to have little direct benefit to them. They take some time to be convinced that an advice forum is important. Even if it is clearly needed many agencies struggle to prioritise attending meetings when there are so many other demands on their time, such as keeping their service open to clients. A forum's success also depends on the agencies that are actively involved in running meetings, and it is often difficult to identify organisations that are willing to provide practical support with the running of the advice forum. In AdviceUK's experience, in order to overcome common problems it is crucial that the forum is led by the core principles set out in this briefing, which ensure it is led by the needs of local advice agencies.

Practical considerations for success

In order to ensure that forums meet the core principles set out in this briefing, effective practical arrangements must be put in place.

Key practical considerations when setting up an advice forum and their link to the core principles for developing advice forums are set out below:

- **Inclusive:**

A broad membership: Advice forums are set up with a broad membership and without any strict membership requirements. This ensures that lengthy or complicated application processes do not put off agencies. As long as the centre provides advice and is a voluntary sector agency it can be on the mailing list and attend meetings.

An established and regularly updated database: Effective communication requires a database of all organisations providing advice in the sector. Given the nature of the sector, ongoing work needs to be undertaken to ensure all agencies are included.

Contacting members between meetings: Alongside regular mailings by email and/or letter, telephone contact is made with members in between meetings. This may be to follow up a task they have agreed to work on or just to remind them about the meeting. Particular attention is paid to contacting and discussing the forum with small marginalised agencies. Telephone contact is far more successful at engaging groups than written contact.

Effective chairing: With a diverse range of participants, an effective and inclusive chair is needed so that everybody's voice is heard and difficult issues or conflict are dealt with appropriately. An independent chair with a positive view of the whole sector needs to be in place to take on this role. Written guidelines to assist chairs in this role are useful and AdviceUK has developed model guidelines.

- **Responsive to local needs**

A work plan agreed and driven by members: The work plan that is informed by a needs analysis undertaken with forum members is a key document. It ensures that forum meetings focus on issues that are of importance locally. The work plan also provides the forum with a structure and gives members and partners good notice of upcoming agenda items.

A varied agenda: The work plan sets out key agenda items for each meeting. Alongside these main issues other items of recent significance should be built into the agenda, for example through a general information exchange or news item from the CLSP or other relevant local forum. Without creating a crowded agenda, there should be sufficient information content and exchange at each meeting to make at least some agenda items relevant to all members.

Regular evaluation and review: In order to ensure that forum members have ownership of the agenda, regular review at least every six months is important. This can simply be a matter of discussing openly the issues covered over the last six months, looking at how useful each session has been and looking forward to the priorities for the coming period.

- **Delivering benefits to members**

Time to build relationships: At each meeting there should be some opportunity to build relationships. This could be through informal networking at a coffee break or through small group work. If a particular piece of work is taken on by the forum this is also an opportunity to build relationships between different agencies. When setting up a sub group to take on such work, a range of agencies with different perspectives should be selected.

Mix of perspectives: Content at meetings should be a mix of sharing expertise from local advice agencies and sessions delivered by external agencies. Engaging members in presenting information is key to building relationships and trust, and to encouraging local learning. It is also a very important part of establishing ownership of the advice forum. External presentations can help to introduce new perspectives and impart

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important information about funding, legislation changes etc.

Coordination of the programme: In order to ensure that the forum is of benefit to members it is crucial that there is clear responsibility for coordinating meetings and speakers so that the work plan and agenda are delivered effectively.

Clear and concise minutes are crucial. Minutes allow those who were present to follow up issues and those who were not to get a flavour of the meeting. Minutes should not include the detail of each session, but focus on key pieces of information and provide members with information about how to follow issues up themselves (websites/telephone numbers etc.). In this way they can provide a key, practical resource even to advice providers that are unable to attend meetings.

Agenda in advance: The agenda should be sent out at least two weeks in advance of the next meeting. The date of the next meeting should be set at the end of each meeting so that it is already in people's diaries.

• **Complementary not duplicating**

Commitment from members and partners: At the initial stages of forum development and at key stages in the forum's development commitment from

agencies and partners to the forum's work should be sought. When engaging agencies and partners, discussion should take place about other forum initiatives and partnerships in existence to ensure that the forum's role is clear and does not duplicate other work.

Identifying other forums: A useful exercise at the first meeting is to identify all other known forums in the geographical area. Forums can then be mapped to identify their role and who is involved. In some places this exercise will have already been undertaken by the CVS. Nevertheless a discussion about other forums that advice agencies attend is useful. From this starting point an advice forum can ensure that it does not duplicate work and that it explores working together with other networks where appropriate.

Keeping advice specific focus:

Maintaining an advice specific focus is key to avoiding duplication. In setting the agenda and work plan for the forum the advice specific nature of each item should be considered. Technical support from a second tier agency such as AdviceUK or an advice centre locally is important to ensure continued advice relevance. It is also important that, whilst keeping a local perspective, the forum takes account of the wider policy and funding context in which advice providers operate.

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• Independent

Terms of reference: Brief terms of reference that clearly set out the purpose and role of the forum as well as its inclusive nature are crucial. The terms of reference should also clearly identify the membership of the forum and any independence issues.

Sustainability: By sustainability we mean the forum continuing to exist after AdviceUK's involvement ends. AdviceUK considers the future sustainability and local ownership of each forum from the outset. In this way, realistic plans can be made with local agencies contributing to defining the way forward.

However, this can still be a difficult area due to the limited resources of the voluntary sector: in-kind and financial support is often crucial to sustainability at this stage. Other resources that assist a forum's sustainability include access to free or low cost local meeting venues; a realistic programme of bimonthly meetings; access to forum members by e-mail.

Conclusion

A successful advice forum provides help and assistance to a wide range of advice agencies. In great part this is achieved by facilitating networking and mutual support.

One of the greatest successes of the forum strategy has been where lasting working relationships have been established between local advice agencies. As a sector that is often forced by the funding climate into competition, a successful advice forum offers the sector an opportunity to get support and assistance, as well as the ability to challenge together policies and practices that threaten the sector and its clients.

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