

The role of advice agencies and local strategic partners in advice forums

Introduction

This briefing highlights the important aspects of the role that different organisations play in relation to a forum. It uses some practical examples to explore how this can work in practice. It should be useful to any agency wishing to be involved in a forum by giving a clear picture of what can be involved. **Section 1** explores the roles that advice agencies play in forums. **Section 2** focuses on the role of strategic partners.

Section 1: Participation - the role of advice providers

An advice forum cannot exist without the effective involvement and engagement of local advice providers, be they advice or law centres, or groups meeting the advice needs of particular communities, for example, refugees or women. In the initial stages of forum development time needs to be taken to ensure that a forum meets its members' needs. Once the forum is established it is crucial that advice agencies lead its development. In

this way a forum is more likely to be of benefit and to be sustainable.

Given work pressures within the advice sector, attending and participating in forum meetings is often not prioritised. However the importance of forum meetings and their relationship to client work should not be underestimated. An effective advice forum has the potential to improve referrals by networking and coordinating local service provision, so improving the service received by clients. A forum can also enable agencies to access free training, thereby increasing the quality of the advice given to clients.

Furthermore, a forum has the potential to increase an advice agency's fundraising skills, thereby improving its sustainability. Even if an agency cannot attend a meeting, there are a number of ways that they can participate - from making sure they have read minutes to contacting the chair with an idea for the next meeting.

This section outlines the role that advice agencies play within an advice forum. It is intended as a baseline for an advice forum to function effectively. If a forum is working to deliver significant training

Advice Forums

programmes or social policy projects more resources will be required. It is essential that all advice agencies play a role within an advice forum and that their voices and views are equally heard.

However, it is clear that some agencies have more available resources to support the work of a forum and it is likely that this will be reflected in the roles and responsibilities that each agency takes on. Furthermore, community education and social policy is a core service for some advice or law centres. In local authorities where such an agency exists, attempts should be made to ensure that the forum and key local advice or law centers work effectively together to their mutual benefit.

Engaging with the forum as an advice centre: There are a number of key ways that are central to advice centers engaging with advice forums.

1 Attending meetings and encouraging others to attend:

Regularly attending forum meetings is key. If the key contact is not able to attend, try and identify someone else within the organisation to come. If it is impossible to attend a meeting, sending apologies helps the forum co-ordinator to know your organisation has received necessary information and is still engaged in the forum's work.

It is also important to contact other agencies in your local authority that you think would be interested in the forum's work. This will help to increase awareness of the forum and engage as many advice agencies as possible in its work.

2 Identifying the appropriate person to attend each meeting from your centre:

There is often one main contact person within each advice centre who will attend most meetings and receive paper work. However, it may be appropriate for other members of staff to attend some meetings if the key contact is away, or if a meeting is more appropriate to someone else's work area. For example, a meeting focusing on housing benefit issues is clearly relevant for workers directly involved in advice giving whereas a meeting focusing on quality standards would be relevant to both advice workers and the coordinator of an advice agency. Advice agencies should ensure that there is effective communication within their organisation about meetings to make sure that the right people attend meetings and to ensure that relevant information is fed back to others, for example, at a team meeting.

3 Taking part in setting the agenda for meetings:

The work plan and agenda for each meeting are agreed by forum members. Agendas are finalised by the

Advice Forums

organisation coordinating or chairing the forum. It is important that advice agencies take ownership of the agenda setting process so that meetings meet their needs effectively. Thinking through things that you would like to talk about at forum meetings and raising these is an important way of taking ownership of the forum and ensures that meetings meet your needs.

4 Agreeing key documents: There are a number of key documents which need to be agreed for the forum to function effectively, including the terms of reference and the work plan. Making sure that you contribute to developing these documents at forum meetings and read any key documents sent out in advance of meetings will help to ensure that documents accurately reflect the needs of local agencies.

5 Playing a role in the functioning of the forum: There are a number of tasks that need to take place in order for a forum to function effectively. Tasks may be undertaken by AdviceUK in the initial stages of a new forum. However, in order to ensure that the forum is sustainable in the longer term, roles will need to be taken on by local advice providers and strategic partners. The examples at the end of this section, on page 4 of the briefing show how some forums have organised this allocation of tasks.

Each advice centre should think about whether they could take on the roles identified below or any others identified by the forum. It would not be appropriate for every agency or individual to take on a task. If you don't think you can take on a role, identifying another agency that might be able to take on a task, or identifying how you could support someone else doing this role is also important. However, it is also important to recognise that taking on the role of chair (or indeed minute taker) is not always feasible without specific funding, training and support.

- **Chairing:** A chair (or a number chairs working in rotation) needs to be in place in order to plan and run meetings effectively. Many extremely effective chairs have been identified from within a local advice centre.

- **Taking minutes:** Minutes are the main way that advice forums communicate their work. These need to be prepared after each meeting.

- **Essential administration tasks:** There are some basic administration tasks that need to be undertaken for the forum to run. These include sending out papers including minutes, agendas and notices of meetings, keeping the forum database up to date, arranging venues and refreshments for meetings and being a first point of contact for questions about the forum.

Coordinating speakers and the

work programme: An effective forum relies on a programme of meetings which are relevant to its members. Once a work programme is in place it is important that appropriate speakers are identified and contacted to invite them to meetings. Once a speaker has agreed to attend details of the meeting, including what the presentation should cover, time allocated, date, venue and agenda and the practical details should be forwarded to them.

- **Advice focus role:** The forum discusses a range of issues but its focus is advice and information – ensuring that this theme is central to all meetings is key. One of the successes of AdviceUK’s forum strategy, identified through evaluation, has been the fact that AdviceUK has been able to link forum members into wider advice policy issues. Members of the forum should be identified to monitor that the advice angle of each meeting is maintained.

This role could be undertaken by the Chair. However, identifying other forum members to take on this role can also work effectively and provide important support for the Chair. It is likely that the organisation taking on this role will be a member of a national advice network - for example, AdviceUK, Citizens Advice, Law Centres Federation, Age Concern, DIAL and

Youth Access - whose services are dedicated to advice provision.

- **Linking to other partnerships:** Acting as the forum’s representative to the Community Legal Service Partnership (CLSP) or other partnership meetings to report on the work of the forum and feed back the outcome of these meetings.

This is an important role, both in terms of access to information for the forum, maintaining links with strategic partners, informing others about the work the forum is doing and avoiding duplication.

- **Offering a venue:** Do you have space in your centre to hold a forum meeting? It might not be available for each meeting but could you offer it once a year?

- **Giving a presentation:** Could you give a presentation about an aspect of your work, the needs of your specific client group, or how to refer clients effectively to your services?

Examples of effective engagement of advice centres:

1. Setting up a steering group: In two boroughs in London, for example, a steering group was established to ensure that advice forum meetings were chaired, minutes were taken and agendas were set. Both steering groups were set up at the

Advice Forums

end of AdviceUK's involvement in the forum, as it was not possible to identify one organisation to take on the role of coordinating the forum.

However, a number of better resourced agencies within the borough were willing to share the responsibility for running the forum by working together and taking on specific tasks. The agencies also felt that the steering group model would avoid problems that could arise if the forum was led by one agency.

A steering group was set up to ensure that these tasks were coordinated and that if one person was unable to undertake their task they were able to ask other steering group members to take on the role. When setting up a steering group it is important that a minimum of three and a maximum of six local agencies are involved in order to make meetings manageable.

It is important that the group has a clear remit. In both boroughs the role of the steering group was set out in writing and agreed by other forum members. Finally, each member of the group should have a clear role and participate actively.

2. Capacity-building members of the forum: In some local authorities it has been identified that members of the forum need support in order to take a more active role in the forum's work. In a newly

established forum running for six months, it was identified that there was a need for better links between the CLSP and the forum / the broader advice sector.

No one was able to take on this role and AdviceUK and the local CVS identified that there was a need provide training and support to one or more members of the forum in order to do this. Attending partnership meetings can be a daunting task. Small agencies that are under represented at a CLSP level can feel isolated and ignored in such settings.

Furthermore, if you are representing the views of a broad range of advice agencies it is important that you can do this clearly and effectively. A training programme will be designed by the CVS in consultation with AdviceUK so that one or two members of the forum can be provided with the necessary skills to take on this role.

Section 2: Support and liaison – the role of strategic partners- Why are strategic partners important?

The strategic value of an advice forum can only be fully realised with the commitment and practical support of strategic partners. Connections with partners ensure that there is local awareness of the forum and its work. This helps to ensure that advice agencies know about the forum and also

Advice Forums

that relevant policy issues are referred to the forum.

Strategic partners are also important in ensuring that the forum is seen to be a key consultative partner. This is crucial if the forum is to create significant developments in the advice sector. Furthermore, if the forum itself is undertaking any social policy work, strategic partners can provide advice and may be able to take policy concerns to relevant people within the local authority.

Who are these strategic partners?

Strategic partners will always differ to a certain extent. However, broadly speaking, the local authority, Legal Services Commission and local Council for Voluntary Services (CVS) are key strategic partners. Strategic partners might also include AdviceUK or other second tier agencies.

A Black and Minority Ethnic (BME) focused forum may link more closely with BME specific agencies such as the local Racial Equality Partnership or Council. Within local authorities it is important to ensure that contact with the right department is established. Contact should be established with the department of the council that has responsibility for funding and monitoring advice services, as well as the department (it may be the same one) that is responsible for leading on strategic issues for the advice sector through the

Community Legal Services Partnership (CLSP).

Some forums have established contacts with other departments including the Benefits Team and Homeless Persons Unit to discuss and improve clients' access to services. It is also important to establish a relationship with staff at the Regional Legal Services Commission to inform and be informed by their various strategies.

What role might strategic partners play within an advice forum?

Strategic partners have been involved in forums in a number of different ways.

1. Supporting the practical running of the forum, for example providing a room for forum meetings.
2. Providing information about current issues to forum members such as funding, changes in legislation, local authority work on relevant strategies for example Homelessness Strategy
3. Supporting the forum representative on the CLSP
4. Encouraging attendance at forum meetings
5. Funding the forums ongoing costs (including, for example, venue hire)

6. Funding a project for the benefit of forum members (for example training or developing advice information leaflets)

How might a forum benefit strategic partners?

An advice forum can be of significant benefit to strategic partners who are actively involved in supporting its work.

1 Accurate information about need for advice and inclusive consultation:

CLSPs have often struggled to get accurate and up to date information about need for advice and existing advice agencies in the locality in order to get an accurate picture of where to prioritise funding. Many CLSPs have lacked a strong connection with the wider advice sector, particularly small and marginalised advice providers serving excluded communities.

Supporting a local advice forum engaged with the whole of the advice sector can ensure that there is an inclusive consultation process. Such a process is one of the key ways that local strategic planning for advice can become more credible and inclusive.

2 Better funding applications and increased access to funding for the

local advice sector: By focusing on good practice, advice forums can enhance the quality of funding applications submitted by advice agencies and increase awareness about opportunities for funding.

Furthermore, with stronger links between advice agencies, partnership working and partnership bids are more likely.

Increased co-ordination of service provision and funding bids can both avoid duplication and attract funding. Increased funding benefits advice centres and the clients that they serve. Such projects can in turn meet the strategic goals of local authorities, the Legal Services Commission and the CLSP.

3 Projects aimed at increasing coordination in the sector can deliver more effectively:

Greater coordination between advice agencies is also of benefit to any second tier agency. Forums can provide opportunities to ensure inclusive consultation about new projects, effective dissemination of information and opportunities to deliver funded projects to a group of appropriate beneficiaries. An effective forum led by its members and with a clear remit is clearly beneficial to any agency that is striving towards better coordination in the voluntary sector.

Advice Forums

Common issues that need to be agreed

When establishing relationships with strategic partners it is important that a number of issues are discussed and agreed. Some of these are very practical. Others are focused on broader issues, such as how the relationship between the forum and the CLSP will work in practice.

The independence of the advice forum

One of the core principles underpinning advice forums is that they are independent. This means that they are led by the voluntary sector agencies that form its membership. Clearly it is important that other partners are engaged with the advice forum's work, but in order to maintain this independence partners such as the local authority and Legal Services Commission are not members of the forum.

In practice this simply means that a local authority or Legal Services Commission representative does not automatically attend meetings, but will ask to attend or be invited to attend meetings where there is a relevant discussion or presentation. Given the role that local authorities and the Legal Services Commission play as funders, and sometimes regulators, of organisations, advice providers may be reluctant to discuss certain issues openly if they are in attendance.

Also, if the forum is to have a distinct role from the CLSP its membership and agenda must be different. However, strategic partners can still benefit both from being informed by the key issues and concerns that affect advice providers and their clients within the borough and also from having a clear point of consultation and engagement with the local advice sector.

Building in effective links between the forum and partners

In order to ensure that the forum and strategic partners can work effectively together, methods of communicating with each other and linking work should be discussed at the outset. It is important that strategic partners are kept up to date with the work of the advice forum.

Likewise it is important that any policy or project work being undertaken by a strategic partner and relevant to the advice forum should be fed to the forum effectively. It is important that the flow of information and requests is two way. One of the concerns of some advice agencies - particularly small BME community organisations - is that they are constantly asked to take part in consultations about policy without being sure that they will see the results of such consultations, and without any wider benefits to their organisation.

It is important that the forum is informed of the outcomes of the work they have been involved in and can also make reasonable requests or proposals to strategic partners/the CLSP.

Potential conflicts of interest

How will a significant difference of opinion about need for advice between the forum and the CLSP be addressed?

There is the potential for conflicts of interest between the advice forum and strategic partners. This should be recognised by both sides and a process for discussing such conflicts discussed.

How could such an impasse be dealt with? In some London boroughs a brief agreement has been drawn up setting out the different roles of the advice forum and CLSP and recognising the potential for such conflicts.

Practical issues

Alongside these broad issues, some practical issues need to be resolved. One of the significant ways that strategic partners can assist forums, particularly in their early stages of development, is by meeting the costs of venues for meetings (for example, by enabling the forum to meet in the council premises).

If there are costs related to a consultation event that the strategic partner has requested it would again be important that these are met by the strategic partner.

Conclusion

This briefing sets out the baseline role that advice agencies play within an effective

advice forum. It also clarifies the key role that strategic partners play in the sustainability and effectiveness of local advice forums. It is clear that there is a need for long-term support to local advice forums if they are to remain effective, relevant and sustainable.

Whilst working together places demands upon partners and their resources, it is vital if we are to provide good quality, co-ordinated information, advice and legal services provision for clients in need.

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