

Sustainable advice forums

Sustainability - the ability to continue, maintain, develop, keep going and to keep alive
Oxford Dictionary mini reference

Introduction

Funders are increasingly concerned about sustainability of projects and services that they support. They want to see that the skills, knowledge and services developed through the projects will not be lost after the end of their grants. For instance, Big Lottery Fund's new Advice Plus programme puts sustainability at the heart of its funding criteria. Bidders are thus expected to have in place a well thought out exit strategy or sustainability plan before they can successfully obtain funding.

AdviceUK's forum strategy adopts a similar approach. Although not a funder, when working with local agencies to establish or develop a local advice forum, AdviceUK always considers sustainability from the outset and at the planning stages. Where this has failed to happen forum facilitators, (many of whom work full time as frontline advice workers), have struggled to manage the ongoing administration and development of the advice forum; the result of inadequate support or resources to enable the forum to progress in a sustained way.

When the Advice Forum Development Project (AFDP) asked 12 advice forums lead workers to identify the issues of greatest concern to them, the top two concerns were getting funding for the advice forum and then sustaining it. This briefing primarily focuses on the latter issue, as we feel that a sustainable advice forum includes finding funding and resources, which enables the forum to deliver on its mutually agreed objectives.

Sustainability issues

Threats to the sustainability of local advice forums include:

➤ **Isolation or a lack of time to undertake responsibility**

Responsibility for the servicing and agenda setting of advice forum meetings has often fallen to one person or agency. This puts a heavy burden on one individual to set meeting times

and agendas, organise venues, secure speakers or trainers, advertise the meetings, chair meetings, take and circulate minutes, and ensure that the forum is maintaining adequate links with other initiatives or bodies operating in the area. Feedback from lead staff members indicate that, due to onerous

workloads with their core job, they are frequently unable to allocate sufficient time to both running the forum and seeking funding to ensure its sustainability. In many cases, the forum lead agency and lead staff member are responsible for all the above rather than the tasks being shared out amongst the forum members. When lead agencies have to operate in isolation this leads to problems in time commitment and morale.

Many forum leaders initially agree to take on the forums' leadership on a purely voluntary basis; it is not a funded role and does not form part of the worker's job description. As such it can be especially difficult to maintain the lead agency role and in some cases the worker may continually have to justify the time commitment to their employers - especially if their ongoing involvement in their forum is being undertaken without any additional resources.

➤ **Lack of or insufficient funding/resources to sustain the forum**

Resources, in terms either of funding or personnel, have to be made available to ensure the sustainability of the forum. Where the process of establishing a forum starts without sufficient support of key partners, such as the local authority or CVS, the forum can be headed for failure.

Ideally, the most appropriate body to perform the administrative and servicing functions can be the local voluntary services council, while the task of ensuring advice remains the forum's central focus can fall to a more generalist and mainstream advice agency, such as a CAB or law centre. These mainstream advice agencies usually have access to a wider range of resources than a smaller agency, or one that seeks to meet the specific needs of a particular community. The CVS and lead agency should then ensure that resources for running the forum are included in their service level agreements or funding bids. (See roles and responsibilities chart on page 6)

➤ **Attendance**

Attendance is one of the main concerns cited by forum facilitators. Due to their isolation, facilitators do not know what a good attendance is, or do not have the time to ensure that all stakeholders regularly attend forum meetings. In some local authorities, small and marginalised groups have not attended forums regularly – many forums have a core membership of more developed agencies. This impacts on the legitimacy of the forum, and detracts from one of a forum's key purposes, linking advice provision, and especially smaller agency provision, across the local authority. The AFDP research found that of half of the existing forums around 40% said they identified attendance as being a problem.

➤ **Too many other forums locally**

Organisations often mention forum duplication or overlap as a reason for lack of attendance. Multiple forums require additional commitments of staff time. Where there are other more specific advice forums, for example a welfare benefits or debt forum, advice forums should ensure that they have links with these bodies or incorporate the sector forums as sub-groups of the general, umbrella advice forum. Members need to identify what is distinct about each sub-group or sectoral forum, confirm that no duplication takes place, and ensure that meeting dates do not conflict.

➤ **Independence**

For some forums the issue of independence is of concern. While some forums feel the support of a local authority representative as an invited guest to the forum is okay, others have agreed that local authorities should not have an automatic right to attend and contribute to the forum.

Many advice providers are funded by their local authority. They may feel uneasy about raising objections or concerns that directly relate to local authority policy or practice. This idea of independence from local authority presence in a forum, however, may conflict with recent developments by the Legal Services Commission strategy, which aims to introduce alternative ways of delivering advice that could affect many local providers funding. The introduction of CLACs and CLANs and preferred supplier will have an enormous impact on the advice landscape should the strategy become a reality. According to a former Planning & Partnership

manager at the LSC, forums need to be more politically focused as the 'days ahead are going to be difficult for the sector'.

In addition, many other issues include:

➤ **Perception by forum lead agency that agenda appears dominated by their agency's issues**

Local lead agencies are often concerned that the forum agendas bears too much of their own organisation's influence, and that forum members may think there is too much emphasis on the lead agencies' priorities and issues in terms of the forum's focus and how it is run. In many cases, this is the result of a lack of adequate feedback to the lead agency of pertinent issues for discussion by forum members.

Many forum leaders would like to see others take up a greater role and ownership of the forum, whereas the reality is that many attendees are apparently quite content to sit back and allow the lead agency to steer and influence the forum's programme. This lack of feedback may mean that important issues are not being brought to the lead agency's attention. It also adds to the feeling of isolation felt by the lead forum worker, who is then tasked with keeping the agendas fresh and interesting. Lead agencies need to ensure that a continual and transparent updating of the forum work plan is achieved in a manner that pushes local agencies to input their issues, concerns and ideas.

In wanting to achieve an agenda that is relevant to all, some forums may struggle to pitch the agenda just right. For example, although larger advice agencies may understand the impact of CLACs/CLANs and thus want to discuss them on the agenda, smaller agencies may not fully properly understand their significance, particularly where advice forms just one part of many other services they offer.

➤ **Not effective enough in influencing local advice policy**

There is a danger that a weakly-led forum may turn into a talking shop that fails to report key issues and problems to relevant local agencies, and fails to ensure that advice remains a key concern in local area agreements or local authority strategies. Forums need to ensure that they feed into the local strategic plan, and help monitor if the plan is meeting its targets.

Advice Forums

Failures by service providers such as Job Centre Plus or local departments need to be identified and addressed by the forum.

➤ **Maintaining the momentum**

Keeping going can prove difficult to an advice forum leader who faces many of the problems mentioned above. After operating for several years, lead agencies often find it difficult to inspire and facilitate a forum that remains relevant and suitably useful for attendees. Sharing responsibilities, and continually updating the work plan and reviewing this should help keep the forum fresh and maintain momentum.

➤ **Over reliance on AdviceUK**

Where AdviceUK has helped establish a forum, there is often a reliance on AdviceUK to perpetually lead the forum, despite clear and early warning that the initial facilitation role will be limited. AdviceUK does not have the capacity to provide administrative support for all the advice forums that we have helped to establish. To be most effective, advice forums should be locally led, with clear succession routes for chairing, facilitating, marketing and agenda setting. In our experience, where a forum is launched without these issues being addressed, sustainability is much more difficult to negotiate at the end of AdviceUK's initial engagement.

What might a sustainable advice forum look like?

Roles and responsibilities

Tasks such as taking minutes, chairing meetings, sending out mailing and setting up a database are crucial elements for a forum to be successful.

A sustainable forum has active engagement and commitment of partners from the outset, with key administrative and facilitative tasks taken on by a local agency or group of agencies. In the case of the Hillingdon Advice Forum, the local Law Centre has taken the lead, whereas in Redbridge, the CAB and CVS share the responsibilities. Newer forums such as Lambeth have decided to incorporate a rotation system for key tasks from the outset, thereby reducing the burden on any one agency.

Local strategic partners involved from the outset

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. 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.

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.

It is crucial that advice agencies lead a forum's development. In this way a forum is likely to be of benefit and to be sustainable. (From **The role of advice agencies and local strategic partners in advice forums**)

Given work pressures within the advice sector, attending and participating in forum meetings is often not prioritised. Keeping partners involved despite heavy work commitments is best achieved by tackling local issues affecting the advice agencies, such as problems with local housing benefits staff.

Both advice agencies and strategic partners are crucial to the success of advice forums. An advice forum cannot exist without the effective involvement and engagement of local advice providers, be they advice agencies, law centres or groups meeting the advice needs of particular communities (for example, refugees or women). The most effective advice forums also include other stakeholders and strategic partners with an interest in an effective advice provision, including local authority departments and the PCT. Advice forums could also consider broadening stakeholder involvement to other signposters or referral agencies such as Victims Support, housing associations, the local police, faith groups, local councilors, and violence prevention agencies.

The role of strategic partners within an advice forum might include:

- Supporting the practical running of the forum
- Providing information about current issues such as funding, changes in legislation, local authority work on relevant strategies
- Supporting the forum rep on the CLSP

- Encouraging attendance at forum meetings
- Funding the forums ongoing costs
- Funding a project for the benefit of forum members (for example training).

Relevant agenda – policy solutions

A forum that responds to relevant local issues raised by local providers is one that is more likely to remain sustainable. Much of the demand for advice services originates from maladministration, whether that is on the part of the council and/or the Benefits Agency. Here, forums could provide the chance for members to address this type of injustice collectively.

Discussions between different participants on a host of issues, such as housing benefit administration and homelessness policy, could co-ordinate responses on issues of greatest concern to forum members. In turn it could bring significant pressure for changes in the way local service providers operate, bring benefits for local people through improved services.

The advice sector is in an ideal position to bring to the attention of decision makers the effect of their actions and make recommendations as to how things can be improved. Members of advice forums have direct access to the most disadvantaged and hard-to-reach clients. A collaborative approach of identifying and advocating for the needs of these clients, which the forum can facilitate, means that many more individuals are assisted (not just those that seek advice), and structural and policy problems that contribute to disadvantaged people are tackled at source.

If the forum 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 or elsewhere. If the forum is to have a role distinct from the Community Legal Service Partnership its membership and agenda must be different, and quite likely broader.

Case study

To ensure the sustainability of a forum in South East London after AdviceUK withdrew, a local advice agency was supported to take on the role of lead agency. With help from the AdviceUK development worker, funding was successfully acquired from Awards For All. This helped pay for the time and effort of a local advice worker to service the forum and to co-ordinate the training element of the advice programme. The forum worker continues to

receive ongoing support from the AFDP and accesses practical tools and resources from the AFDP website.

Networking

The ability to network with others in a similar role elsewhere can offer some consolation, support and assurance that a forum worker is not alone. Networking with other neighbouring forum lead agencies can enable forum leaders to arrive at collective solutions to their problems such as those mentioned earlier.

Ongoing networking with AdviceUK can also lend additional support. A review of what is going well by the AFDP might help assure the forum leader and members that things are going well or at least better than at first thought. It could help refocus and reinvigorate a flagging membership as the forum is able to identify triggers for people attending the forum and the reasons why some do not attend. They are then in an improved position to respond to these issues appropriately.

Good attendance

Some forums are enjoying ongoing and consistently good attendance with an average attendance of between 15 to 20 participants.

There are key ways that advice centres can engage with advice forums: attending meetings and encouraging others to attend. A relevant agenda, accessible and suitable venue will all facilitate the ongoing interest and participation of forum members.

Relevant agenda

It is important that advice agencies take ownership of the agenda setting process so that meetings meet their needs effectively. Thinking things through 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 attendee's needs.

A forum lead worker can hold an important role of reporting on the work of the forum and feedback the outcome of these meetings.

Linking to other partnerships provide forums with access to information, maintains links with strategic partners, informs others about the work the forum is doing and avoids duplication.

Elements of a sustainable advice forum

A sustainable forum has the following elements in place:

Admin

- Clear roles and responsibilities for the forum members e.g. elect a chair, vice chair and defines their responsibilities. An accessible and preferably neutral venue from which to meet.

Attendance & inclusiveness (small groups attending)

- Consistent and varied membership/attendance at forum meetings including a representative percentage of BME/RCO organisations in attendance. In addition it enforces this by proactively following up groups that are not attending and monitors non attendance in order to take appropriate action

Funding

- Adequate financial/other resources identified to enable the forum to sustain itself after adviceuk withdraw (exit strategy)

Interesting agenda

- A projection/plan of what the forum will do in the year ahead; maintains planning as part of the agenda

Social policy impact & influence

- An influence on CLSP development and local policy; sends minutes from forum to CLSP steering group

How to make your forum sustainable

Elements of a sustainable advice forum

Advice Forums

A sustainable advice forum is likely to have in place the following best practice elements:

- Key partners involved from planning stage – local authority, CABx, Law Centre, CVS, Age Concern, independent advice providers
- Funding for a local partner to offer administration
- Regular venue
- Sharing database of local advice providers – avoiding small groups slipping through cracks
- Hitting the ground running – addressing needs and issues from 2nd meeting.
- Agreeing membership – involvement of local authority, for profit providers, signposters?

A sustainable advice forum usually has a diverse range of providers in attendance; generalist, women, disability groups, BME and RCO, law centres and other mainstream providers. It may be advisable to broaden involvement to a wider group of stakeholders to ensure adequate advice coverage and choice when the LSC and local authorities start to commission CLACs or CLANs.

To ensure your forum remains sustainable in the new tight funding environment, it may be time to ask some challenging questions such as:

1. What is the forum plan/strategy?
2. What is the forum seeking to achieve?
3. How does the forum know it is accomplishing those things it set out to do?
4. Does the forums remit need to now go beyond networking?
5. Is it time to formalise the purpose of forums?

Making an adequate response to these questions will require a range of additional skills and resources, including time, money and effort and a newly developed strategy across forums. A key question to ask might be: is now the right time for forums to secure their sustainability? Could this allow forums to come up with collective solutions to common concerns around administration and support?

Sustainability options

Service level agreements

In some local authorities where a forum is led by an agency with a service level agreement (SLA), there may be the option of negotiating for the role of the forum to be incorporated into the following years SLA. This is a key way of ensuring that the work of the forum is formalised, funded and accountable. Forums might form a key element of engagement and co-operation between organisations that secure commissioning tenders, CLACs or CLANs in the future. Indeed, should a CLAC/CLAN be commissioned, it would be the most obvious place to embed sustainability, thereby ensuring that gateway provision and co-operation with smaller, still significant providers of advice continues.

Grant or Trust Funding

Funding is often high on the agenda of forum work, reflecting the wider funding issues faced by advice agencies. Of the 11 advice forums that the Advice Forum Development Project has engaged, over 80 per cent identified funding as a priority area requiring development. However, more and more funders are showing an interest in funding the administration and development of local advice forums; Awards For All, City Parochial Foundation, Lloyds TSB Foundation represent some of these. There are also other local pots of funding that advice forum agencies can tap into to support their work.

To ensure that forums are successful and sustainable, here again is a checklist of practical considerations for success:

1. Obtain support to apply for funding the forums work whilst considering partnership bids with other forums elsewhere
2. Contact members between meetings
3. Elect an effective and inclusive chair
4. Create a relevant agenda in consultation with all forum members
5. Carry out regular evaluation and review of the forum agenda and achievements
6. Encourage providers to share expertise from their local advice agencies
7. Ensure minutes are clear and concise
8. Ensure your forum complements rather than duplicates other fora
9. Gain commitment from members and partners:

Advice Forums

10. Review the profile and make-up of your forum members
11. Manage the independence and focus of the forum by making use of the forums Terms of reference
12. Ensure that the forum is recognised in and supports the achievement of Local Area Agreements and local strategic plans.
13. Investigate including time for supporting the forum included in service level agreements or commissions negotiated with the local authority.

Conclusion

By sustainability we mean the forum continuing to exist after AdviceUK's involvement ends and having the means, resources, tools and personnel to continue to do so. A successful and sustainable advice forum is one that brings groups together, assists networking and referrals, has adequate resources, skills and a clear plan in place to enable it to deliver on its agreed objectives. 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 being able to challenge together policies and practices that threaten the sector and its clients.

To realise this vision of a sustainable forum often requires additional resources that enable forum leaders to carry out adequate planning and development, and enable the forum to have some political influence on a local level. It also requires the commitment of all forum stakeholders to keeping the forum relevant, interesting and capable of meeting the training and development needs of its members.

It is AdviceUK's belief that a local advice forum is the most democratic and cost effective way not only to secure its members interests but also to influence local advice plans and ensure that they are as comprehensive, accurate and reflective of the needs, interests and concerns of local people as possible.

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