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## EXECUTIVE

### Meeting to be held on Wednesday 14 December 2011

Please see the attached report marked "to follow" on the agenda.

- 13 FUNDING ARRANGEMENTS FOR INFORMATION, ADVICE AND GUIDANCE SERVICES (Pages 3 - 12)**

*Copies of the documents referred to above can be obtained from*  
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Report No.  
ACS09123

London Borough of Bromley

Agenda  
Item No.

PART 1 - PUBLIC

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Decision Maker: **Adult and Community Services Policy Development and Scrutiny Committee Executive**

Date: **13<sup>th</sup> December 2011**  
**14<sup>th</sup> December 2011**

Decision Type: Non-Urgent Executive Key

**TITLE: Gateway review : Information Advice and Guidance services**

Contact Officer: Claire Lynn, Strategic Commissioner, Mental Health and Substance Misuse  
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Chief Officer: Lorna Blackwood, Assistant Director Commissioning and Partnerships, Adult and Community Services

Ward: Borough Wide

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1. Reason for report

This report outlines the current arrangements for the provision of general and specialist information, advice and guidance services in the field of social care, housing and general enquiry services available to any member of the public. The report covers services funded and commissioned by both Adult and Community Services and Children and Young Peoples Services and proposes a future approach to the provision of these services.

The financial implications are set out in the report on Part 2 of this agenda.

**2. RECOMMENDATION**

The Policy Development and Scrutiny Committee are asked to comment on the following recommendations prior to consideration by the Executive:

- i) To note that all Council service providers in future will have clear contractual responsibility to provide information on their service both in hard copy (where appropriate) and electronically and to ensure this is published either directly, or through links to other websites, on Bromley MyLife;
- ii) To note that one strategic partner/core contract has been identified for each care group to provide information, advice and guidance and that efficiency savings will be sought with regard to existing contracts;

- iii) To agree that specialist advice provision is reviewed to ensure that it is meeting an identified priority need and if not, to agree that the service will be de-commissioned;
- iv) To agree that the Department for Work and Pensions (DWP) is the primary agency responsible for providing assistance with accessing welfare benefits and that the Council will where necessary arrange training for DWP staff to ensure that they have the necessary skills to assist people with particular needs;
- v) To agree that residents will be encouraged to access general information, advice and guidance services through the use of the internet and national help lines;
- vi) To agree to waive the requirement for competitive tendering pursuant to Contract Procedure Rule 13.1 and that a new contract be entered into with Bromley Citizens Advice Bureau (CAB) for a period of two years commencing 1<sup>st</sup> April 2012 as set out in the report on Part 2 of this agenda, with the option to extend for a further year (with authority to exercise the option to extend to be delegated to the relevant Chief Officer in consultation with the relevant Portfolio Holder). Funding will be reduced over a two year period (2012/13 and 2013/14), to enable the CAB, in line with its own development proposals, to move to a service based on outreach provision, telephone and internet access.

The Executive is asked to agree the recommendations set out in i) to vi) above.

### Corporate Policy

1. Policy Status: Building a Better Bromley, Local Area Agreement,
  2. BBB Priority: Increasing Independence
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### Financial

1. Cost of proposal: £ See Part 2 report
  2. Ongoing costs: £ See Part 2 report
  3. Budget head/performance centre
  4. Total current budget for this head: £
  5. Source of funding:
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### Staff

1. Number of staff (current and additional) – N/A
  2. If from existing staff resources, number of staff hours – N/A
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### Legal

1. Legal Requirement: No statutory requirement or Government guidance
  2. Call in: Call in is applicable
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### Customer Impact

1. Estimated number of users/beneficiaries (current and projected) : Strategic partners and specialist advice services deal with more than 30,000 enquiries per annum; CAB dealt with approximately 10,000 enquirers in 2010/11 -
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### Ward Councillor Views

1. Have Ward Councillors been asked for comments? N/A
2. Summary of Ward Councillor's comments: N/A

### 3. COMMENTARY

#### 3.1 Background

3.1.1 Within Bromley, information advice and guidance services in respect of social care, housing and related general enquiries have developed incrementally over a number of years, some based on previous grant funding given by the Council but also through contracts with key third sector providers. This has resulted in the Council commissioning or referring to a range of advice and guidance services funded in a variety of ways. These services are available to all people regardless of financial circumstances or assessed need.

3.1.2 As part of the Supporting Independence in Bromley programme, an Information, Advice and Guidance Strategy was developed to provide a framework for the future commissioning of these services. It established an agreed set of principles for these services: to enable people to access timely and accurate information, and that advice and guidance that is provided in an appropriate format and setting, ensuring that people can make informed choices to support their lives. The strategy also established definitions of information, advice and guidance as follows:

- **Information** is defined as “the open and accessible supply of material deemed to be of interest to a particular population. This can be either passively available or actively distributed”. This is interpreted as when a person knows their needs, and is able to seek out and to extract relevant information for their needs. At present, the Council and a range of specialist organisations, many part-funded by the Council, take responsibility for producing information for the public.
- **Advice** “offers guidance and direction on a particular course of action which needs to be undertaken in order to realise a need, access a service or realise individual entitlements”. This is interpreted as when a person may not know their needs, or what support is available. Through a series of questions, they are directed towards suitable information.
- **Guidance** is “the provision of support and encouragement, or representation of individuals’ views, needs or rights.” This is interpreted as when a person is supported or represented in order to establish their needs, and in order to obtain services.

3.1.3 Whilst the strategy gives definitions of information, advice and guidance it also covered a range of other areas which are being considered separately and are not part of the information advice and guidance offer under consideration in this report. These include:

- **Advocacy Services** enable an individual to be supported to express views communicate choices and receive services as a result. These services were the subject of a separate report to the Adult and Community Policy Development and Scrutiny Committee on 30<sup>th</sup> November 2011.
- **Consultation forums** which include Experts by Experience, provider, service user and carer’s forums and which provide a system of representation enabling a voice in the planning of services.
- **Brokerage services** provided for older people by Age UK Bromley which was subject to separate report to the Adult and Community Policy Development and Scrutiny Committee on 30<sup>th</sup> November 2011. Bromley Mencap also provide a service under the banner of “brokerage” but which actually provides information, advice and guidance - as such it is considered within this report

## 3.2 Current Provision for Information, Advice and Guidance

3.2.1 Currently information, advice and guidance services are provided either directly by the Council or through contracts with a variety of providers. Increasingly national help lines, particularly on line, are being funded nationally to enable people to access the information, advice and guidance they require. For example, Trading standards refer to Consumer Direct, a nationally funded service for all advice on consumer protection, who may refer cases to the local Citizens Advice Bureau. Locally the Council acts as a hub for residents, directing them as appropriate to the organisation best suited to meet their needs. For social care and housing, it does this through:

□

- **Customer Contact Centre:** The contact centre is the single point of contact for Bromley Council services.
- **Bromley Social Services Direct:** BSSD is a phone line, and is an initial point of contact to find out about social care options. Staff carry out over-the-phone initial assessments to establish whether callers meet the council's eligibility criteria. BSSD also provides information and advice to residents who do not meet the eligibility criteria, and can signpost to a wide range of resources for further support.
- **Bromley MyLife:** This is the Council's interactive social care website. It incorporates a searchable web-based directory of all social care services available to the community, including details on all services and organisations across the statutory, community and private sectors.
- **The Housing service** provides specialist advice directly to people in need of housing and access to housing, including debt advice, some of which is commissioned from an external provider.
- **Libraries** signpost to services and service providers and assist people to use MyLife.
- **The two community one-stop shops** provide information advice and guidance and host surgeries provided by other organisations.
- **The Children and Young Peoples service** provides an in house family information service and children and family centres also provide advice to families and children.

3.2.2 In addition, organisations with whom the Council contracts have a role to play in the provision of information advice and guidance. These fall into the following types:

- **Service contracts:** There is an expectation that all providers with whom the authority contracts should produce information, advice and guidance on their service, who is eligible and how it can be accessed.
- **Strategic Partners:** The Council has a number of contracts with key organisations in Bromley for the provision of information advice and guidance and for the organisations to take a leadership role in terms of planning and partnership working. Each strategic partner covers a particular care group. Most of the strategic partner organisations also have separate contracts for provision of specialised services.

| ORGANISATION                                 | CARE GROUP                        | Number of service users per annum (approx) |
|--|-----------------------------------|--|
| Age UK Bromley                               | Older people                      | 20,000                                     |
| Bromley Mencap                               | People with Learning Disabilities | 680  |
| Bromley MIND                                 | People with mental ill health     | 1,280                                      |
| Deaf Access                                  | People with hearing impairment    | 1,400                                      |
| Kent Association for the Blind               | People with visual impairment     | 900  |
| The Junction                                 | People with HIV/AIDS              | Open door                                  |
| Carers Bromley                               | Carers                            | 2,560                                      |
| Children and Families Voluntary Sector Forum | Children and young people         | N/A  |

- **Specialist advice and guidance services:** A range of specialist information advice and guidance advice services are also commissioned:

| Service Name                  | Provider                  | Core Service Details   | Number of service users per annum (approx) |
|-------------------------------|---------------------------|--|--|
| Welfare Benefits Advice       | Broadway                  | Welfare benefits advice for people with mental health needs                      | 650  |
| Body & Soul                   | Body & Soul               | Provision of an HIV/AIDS telephone advice service, and advocacy                  | 200  |
| Child minding                 | Bromley Mencap            | Information on specialist child-minding  | N/A  |
| Learning disability brokerage | Bromley Mencap            | Assistance with accessing welfare benefits, health services etc                  | 200  |
| Bromley Autistic Trust        | Bromley Autistic Trust    | Provide advice, public education and awareness about autism, raise awareness and | Open door                                  |
| Connexions personal advisors  | Royal Borough of Kingston | Careers advice for young people  | N/A  |
| Debt advice                   | Blackfriars               | Debt advice specifically aimed at helping people retain their homes              | 350  |

- **General advice services:** The Council contracts with Bromley Citizens Advice Bureau (CAB) to provide a free universal advice and guidance service to all Bromley residents should they wish to use it.

The CAB contract is monitored by Adult and Community Services on behalf of the Council and expires in March 2012. A specialist housing service is commissioned separately from CAB, again until March 2012. The Citizens Advice Bureau provides a free impartial advice and information service to all residents of Bromley with the usage of the service shown in the table below:



| Year    | Number of contacts | Number of individuals |
|---------|--------------------|-----------------------|
| 2005/06 | 30,270             | 12,176                |
| 2006/07 | 31,794             | 11,491                |
| 2007/08 | 29,134             | 11,500                |
| 2008/09 | 41,830             | 14,878                |
| 2009/10 | 44,436             | 15,000                |
| 2010/11 | 33,539             | 10,718                |

Using Q1 (2010/11) figures as examples, the types of enquiries dealt with were:

- 535 benefit enquiries of which there were 21 successful appeals and a total of £35,914 was recouped for individuals
- 321 debt enquiries, with 20 agreements entered into and £101,365 of debt written off for individuals
- 271 employment issues of which 1 person was helped to maintain their employment
- 67 immigration / asylum & nationality issues

It is not possible to identify if there is any duplication in the people who may access Citizens Advice Bureau and other information, advice and guidance services but an indication may be the number of individuals signposted on to other services – of a sample of 4489 people who contacted the Bureau, 552 were signposted to other services.

Bromley Citizens Advice Bureau attracts a small proportion of other funding from the national organisation and from grant and partner funding sources. The Bureau has identified that reliance on the public sector for the major funding places a risk to the organisation and is seeking to attract a variety of funding to mitigate against this. It is also exploring a changing model of service based on outreach provision, rather than building based services, and telephone and web access to reduce costs.

### **3.3 Proposed future provision of Information, Advice and Guidance Services**

3.3.1 With the expansion of national websites, including directgov.uk, centrally funded information, advice and guidance is readily available and for the majority of people is the primary source of information to signpost them to the help and support they require. Increased access to the internet through schools, libraries and internet cafes has enabled this further. This approach is being taken to the provision of information advice and guidance for social care, housing and related general enquiries and is consistent with the Council's overall objective to promote and invest in alternative delivery channels.

3.3.2 Within Bromley, the Council has recognised that vulnerable people need to be able to access information about the services they require to meet their needs. It is proposed that the Council continues to provide and commission information advice and guidance services by:

- Ensuring that all organisations with whom the Council contracts provide information on their service both in hard copy and electronically and to ensure this is published, either directly or through links to websites, on Bromley MyLife
- Ensuring that strategic partnerships/core contracts include a requirement to provide information, advice and guidance

- Reviewing specialist advice service provision to ensure that services are meeting an identified priority need.

- 3.3.3 Information, advice and guidance on employment matters is provided by the Department of Work and Pensions (DWP) for the majority of the population. However as DWP staff are not always sufficiently trained in dealing with people with particular needs, this has been supplemented in Bromley through contracts with organisations such as Bromley Mencap and Broadway to enable older people or those with learning disabilities or mental health needs to maximise their income. It is proposed that in future officers work with the DWP to provide training to staff to enable them to support older people and people with learning disabilities and mental health needs to access relevant benefits rather than commissioning supplementary services.
- 3.3.4 Other local authorities have a variety of arrangements for contracting for universal information and advice services which makes direct comparison difficult. Most authorities commission some free universal advice and guidance services. A number of authorities have reviewed or are currently reviewing these services. Southwark spends £3.5 m on these services of which 61% is for general advice and its Citizen Advice Bureau provides a component of this. Greenwich has a six month contract with its local Citizens Advice Bureau and are currently reviewing their services. Other authorities have recently tendered for general advice services which have been awarded to a variety of organisations, not exclusively CABs.
- 3.3.5 In line with the national move to establish help lines and web based information, the Citizen Advice Bureau federation is also planning to develop a national advice line (phone and web based) in line with government policy, although funding for this has not yet been identified.
- 3.3.6 The Government has recently introduced the Advice Services Fund programme not for profit advice providers which Bromley Citizens Advice Bureau (as well as other local organisations) could be eligible to access. These grants will enable advice services to continue to provide quality support and guidance to people in their communities. The Fund will open for applications by the end of November and will be managed by BIG Fund. Applicants must provide advice in at least one of the following priority areas: debt, welfare benefits, employment and housing; and be able to evidence public funding cuts of at least 10% for the specified advice service areas from central and local government sources in 2011/12. The Advice Services Fund will provide grants of £40,000 to £70,000 to be spent on service delivery. The Cabinet Office will also be conducting a review to ensure that people continue to have access to good quality free advice services in their communities.
- 3.3.7 Within this context, and in view of CABs proposed future business plans, it is proposed that funding for Bromley CAB be reduced over a two year period to enable them to reconfigure their business model and to explore other funding sources to mitigate the impact of the reduction in Council funding.

## **4 FINANCIAL IMPLICATIONS**

- 4.1 Details of the financial implications are covered in Part Two of this report.

## **5 POLICY IMPLICATIONS**

- 5.1 The provision of information advice and guidance services meets the Council's objective to enable people to maximise their independence.

## **6 LEGAL IMPLICATIONS**

- 6.1 The European procurement rules regarding the need for competition are not directly applied to contracts such as information advice and guidance, as they are classed as Part B services, but under Regulation 4 there is a need for transparency in managing any tendering exercise. In some cases the Courts have held that this means Part B services may require to be opened up to competition. In any case the Council would, even where one or more of potential tenderers was a not for profit organisation, often still wish to seek competitive bids in order to establish value for money.
- 5.2 However in the present circumstances it is considered that the nature of the services sought and the role and experience of Bromley Citizens Advice Bureau in dealing with general information and advice across a wide spectrum of interest means there is no effective competition within the Borough and that the cost and process of conducting such an exercise would not be justified.
- 5.3 In accordance with Contract Procedural Rule 13.1 the Assistant Director (Commissioning and Partnerships) and the Director of Resources and Assistant Director (Finance) support the waiver of the need for further competition at this time. Should the Executive approve the recommendation a report of the exercise of the waiver will be submitted to the Audit Sub Committee in due course.

| <b>Non-Applicable Sections:</b> | Personnel implications   |
|---------------------------------|--|
| Background Documents:           | <p>ACS 11064. Review of advocacy services. November 2011.</p> <p>ACS 11067. Proposed changes to support planning and brokerage services for people who do not meet the Council's eligibility criteria for social care. November 2011.</p> <p>ACS11002. Supporting independence in Bromley. Promoting technology. January 2011.</p> |

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