

Final Draft

BIRMINGHAM ADVICE STRATEGY 2021 – 2024

*(Birmingham Information, Advice and
Guidance Strategic (IAG) Framework and
Recommendations)*

Short Version

NOVEMBER 2021

Spitfire Services and The Pioneer Group for Birmingham City Council

1. Foreword

Throughout the Covid-19 pandemic, I have worked with a remarkable number of volunteers, community and faith groups, charities and public sector agencies all working together to respond to this profound crisis and to provide and enable advice and support for citizens in Birmingham. At the heart of this response has been the importance of advice services whether provided by a volunteer, a community organisation, an established agency such as the Citizens Advice Birmingham or one of the City Council's directly provided or commissioned providers. The advice given has covered a range of topics from money and debt advice, housing and homelessness, adult and children's social care, education, employment, domestic abuse and mental health and wellbeing. As the socio-economic analysis in this strategy shows, there was already significant need and demand for these services prior to the onset of Covid-19, which has only been deepened by the onset of this public health crisis.

One of the engagement workshops organised to inform the development of this strategy saw both the service users and service providers in tears reflecting on excellent advice work undertaken in a profound moment of need. The selection of case studies featured in this document illustrates some of the outcomes delivered for people in need at this time of crisis through advice. This strategic framework for Information, Advice and Guidance in Birmingham was commissioned early in 2021 and has been produced by Spitfire Services, with input from The Pioneer Group. Both these organisations have worked throughout the Covid-19 crisis with a raft of other partners in the Erdington Taskforce and more widely in the city.

The work they have produced defines a general vision, strategic aims, values and principles with a number of recommendations on how advice services can play a key role in recovery as we move out of the crisis intervention stage of the Covid-19 pandemic and into recovery. It is not intended as a strategy for individual providers in the statutory, public, and voluntary and community sector in Birmingham, as each agency from the diverse and complex network of advice provision, will have their own plans. Rather, it aims to provide a direction of play for the family of advice services, place a focus on improving the quality and accountability of advice services, improve co-ordination and partnership working and align with other key strategies critical for recovery and building back better.

As we move forward as a city, we face unprecedented challenges as the Covid-19 pandemic unfolds. It is clear that the impacts of the pandemic on public health and, therefore, on the economy and communities will continue for the remainder of 2021 and critically for the period covering this strategy. In the last few weeks, people on Universal Credit face a reduction of £20 a week, which equates to £1040 a year. This will have affected 159,000 people in Birmingham removing £165m benefit to those who are in need. The ending of the job retention and furlough schemes in July and September are likely to adversely impact on the wider economy and employment. The announcement of the closure of the GKN plant in Erdington on the 3rd November and the loss of 519 jobs is illustrative of the uncertainty in the economy. This all adds up to the importance of IAG services, linked to wider public service delivery, playing a vital role in providing support to communities across Birmingham in the months ahead as these latest challenges unfold. That is why this strategic framework for advice services is so important.

Councillor John Cotton, Cabinet Member for Social Inclusion, Community Safety and Equalities

PART ONE:

Birmingham Information Advice & Guidance Strategic Framework

1. Introduction

This strategic framework, for Information, Advice and Guidance, (IAG) has been commissioned by Birmingham City Council through funding it received during the Covid-19 pandemic to support communities across the city. A key part of the brief was to set out how the wider family of advice services can build on work that has been carried out during the pandemic by service providers in the public, voluntary and community sectors and how it can align with other provision as part of the recovery efforts moving forward.

A long and short version of the document has been produced. The shorter version sets the vision and mission, key aims and principles, main findings and recommendations and actions. The longer version also includes more analysis and context as well as detailed appendices on the engagement and research carried out, case studies of best practice and a socio-economic analysis and PESTL analysis. As part of the work a Birmingham IAG services directory has been produced detailing cross sector provision of IAG services across the city. This includes an interactive digital map enabling providers and customers to click on their ward or constituency to check out the local advice services available to them by type as well as whether they are accredited and regulated.

2. Overview

There is good overall provision of Information Advice and Guidance (IAG) services by different providers in the statutory, voluntary and community sector both geographically across Birmingham and by the type of advice provided such as money and debt advice, homelessness, domestic abuse, adult social care and so on. Clients¹ appreciate and value the variety and quality of advice they can access in Birmingham.

However, there is room for improvement and to make the wider family of advice more effective by working together in partnership. This includes:

- Maximising the number of service providers who have appropriate accreditation, are regulated and generally accountable for the services they provide.
- Drawing on a leadership role for larger providers to support and mentor smaller providers so they can deliver better quality provision.
- Ensuring that all IAG provision in Birmingham is free at the point of delivery and looking at regulating and holding to account providers who charge for services.
- Improving the effectiveness and responsiveness of advice referrals from one agency to another (whether in the public, voluntary or community sector).
- Understanding how different advice providers can work together across the public, voluntary and community sectors and exploring how a *total advice approach* can improve outcomes, prevent future problems, reduce service demand and save money.
- Ensuring that advice provision seeks to empower and enable clients through information, advice and guidance so they are better equipped to resolve their own issues.
- Creating a culture and practice across different service providers that is client-centric rather than service-centric and within this exploring further how co-production of outcomes can be delivered with clients.

¹ Throughout this document, we use the phrase client to describe service users or customers.

- Providing greater choice on the channels that clients/customers can access advice through face- to-face, telephone, web/digital and developing an approach to supporting digital inclusion to enable clients/customers.

3. Specification to produce the IAG strategic framework

The specification involved undertaking three packages of work to inform and develop an IAG strategic framework. The first focussed on categorising IAG services into granular detail establishing types of IAG, differentiating between accredited, regulated, formal, informal types of provision as well as making observations on operational issues and around scale and their geographical coverage of provision including channels used to deliver services. The second entailed mapping IAG provision, including referral pathways used by clients to inform an appraisal of different IAG strategy options. The third involved developing and disseminating an IAG strategic framework to political and professional stakeholders across the council to underpin a future Advice Information and Guidance strategy.

4. Scope of the IAG strategic framework

a. What is in scope of the strategic framework?

This strategic framework aims to bring together the wide range of provision of different types of IAG services. Its aim is to raise the standards, quality and responsiveness of advice services with a particular emphasis on meeting people's needs as we move from the initial crisis support phase linked to the Covid-19 pandemic to the recovery phase over the next three years.

b. What is not in scope of the strategic framework?

This is not an operating strategy for individual statutory and non-statutory services delivering information, advice and guidance services through the local authority, wider public sector, voluntary and community sectors detailing how their individual service responsibilities can be, effectively, discharged. These responsibilities are met through individual business plans and service strategies held by many agencies involved in delivering advice services.

c. What the strategic framework covers?

The framework identifies the key role played by IAG services in wider service delivery particularly around prevention and delivering person-centred outcomes. Through our mapping work, it sets out the totality of the IAG service offer across different advice types, the roles these play and how these can be accessed through a variety of channels and in physical locations in Birmingham. Through our IAG Service Directory and interactive digital map, we outline those providers that are accredited and regulated. An assessment of the overall strengths, weaknesses, opportunities and threats is provided which helps inform its strategic aims and recommendations. Finally, we illustrate how IAG service delivery has played a key role in supporting people in crisis in the Covid-19 pandemic and the key role in supporting people in the Covid-19 recovery strategy in Birmingham.

d. Family of IAG services in Birmingham

We have engaged and reviewed different IAG service provision in the city across the public, voluntary and community sector. We have developed icons to represent the 11 different

advice types we have scoped and framed them as a family of IAG advice services in the diagram above.



5. Definition of IAG Services

Our working definition for **Information, Advice and Guidance** (IAG) is:

- **Information:** the provision of information can be transmitted face-to-face by advisors or by printed or digital material. This does not explore in-depth options and relies on those who access the material interpreting and acting on the information themselves.
- **Advice:** this provides greater in-depth interaction between an advisor responsible for communicating information to the client. It assumes that the advisor will explain to the client what the meaning of information they are seeking is and where they can get further information.
- **Guidance:** this provides in-depth interaction between the advisor and client. It assumes that the client is engaged in co-producing the planning of a personalised advice plan, the investigation on remedies to the issues identified in the plan with the client making the decisions on the finalised advice.

Our working definition of advice typologies covered in the brief is:

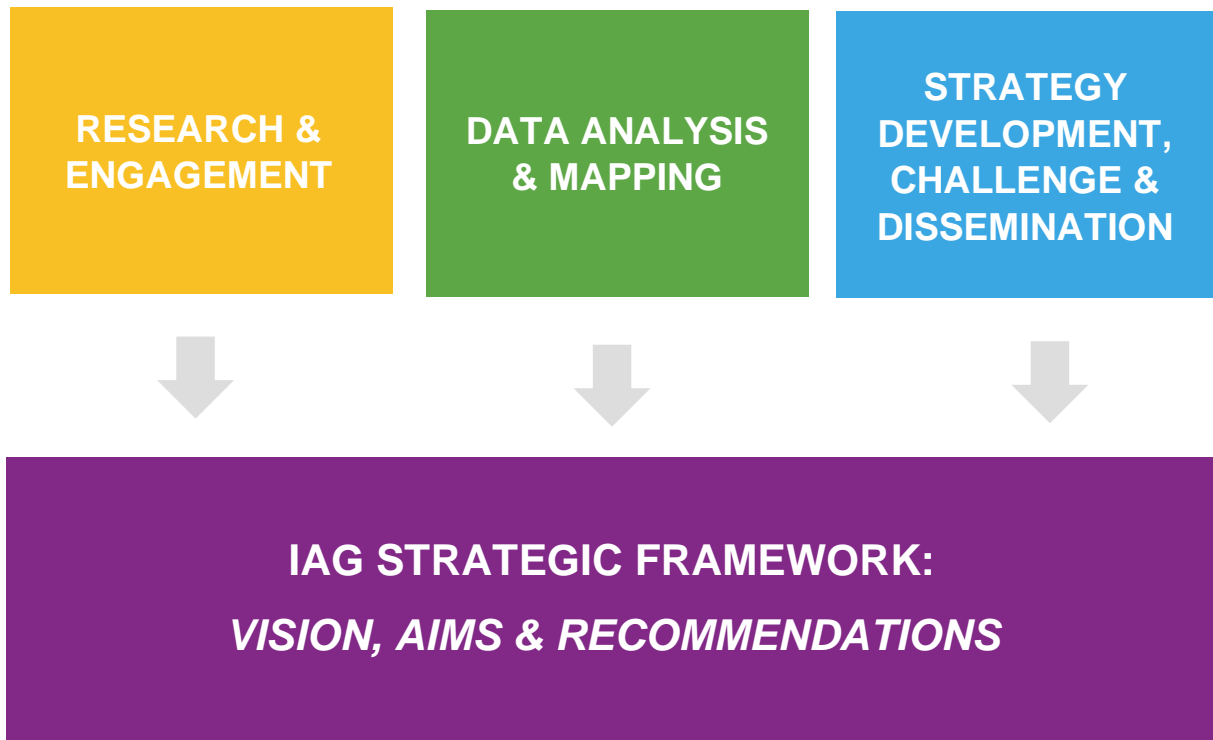
- **Informal Advice** as the provision of advice through family, friends, or small grassroots community organisations. This is generally unregulated and non-accredited but plays an important role in the total advice services offer.
- **Formal Advice** provided through established organisations usually with professional, trained staff backed up with volunteers. This can be delivered across a wider range of advice types.
- **Regulated Advice** where the body providing advice is regulated by a professional institution or government body for example immigration advice services are by law regulated by the Office of the Immigration Services Commissioner (OSC).
- **Accredited Advice** a formal advice provider with accreditations for example Advice Quality Standards (AQS), formerly Community Legal Services Standards. This entails an in depth and rigorous and continuous assessment process including assessment of policies, qualifications of advisors and membership of professional organisations (e.g., Institute of Money Advice), evidence continuous professional development and observation of live advice.

We identify four main accreditation types each with a corresponding regulation line of accountability. These are:

EXTERNAL ACCREDITATION TYPE	REGULATION TYPE
Advice UK	Homes and Community Agency
Advice Quality Standard	Financial Conduct Authority
Matrix	Care Quality Commission
The Survivors Trust National Standard	Office of the immigration Commissioner Ofsted

6. Methodology for Developing the IAG Strategic Framework

Our methodology draws on three work elements – research and engagement; data analysis, mapping and strategic assessment and strategy development, challenge and dissemination.



Our detailed work programme included nearly thirty activities across these three work elements.

a. Research & Engagement

We set out to identify by type and genre IAG services in Birmingham by District and City using existing data sources through commissioning records and published records of agencies. A variety of approaches were used for the engagement process. First, we designed a simple and clear project brief and distributed as widely as possible. We designed a selective engagement process through two on line questionnaires with service users and service providers and follow on in-depth interviews with clients. We organised two open invite engagement workshops, one with clients and one with service providers and stakeholders. We set up bespoke partner meetings or joined in existing meetings with partners and stakeholders to engage with different thematic issues such as homelessness and digital inclusion reaching out to 12 partner engagements in total. Finally, we undertook desktop research and analysis mapping IAG provision across Birmingham, reviewing policy and funding frameworks within and beyond Birmingham.

b. Strategy development and challenge

We then used the evidence and insight generated through our engagement and analysis to develop the IAG strategy framework and tested the emerging approaches via Cabinet members, partners and stakeholder engagement.

7. Operating Context for IAG Services in Birmingham

a. History of IAG advice practice in Birmingham

There has been a strong record of innovation around advice services over the last 25 years in Birmingham. Perhaps amongst the most important was the development of a Neighbourhood Advice and Information services with the first office opening in 1985 in Acocks Green and a further 39 offices opening, with an office in every ward during the 1990s. This was a significant commitment to providing a localised one-stop shop approach to advice service. Staff were trained to provide welfare as other advice genres, making referrals to other specialist providers in the voluntary and community sector and providing links to key Council services particularly housing and benefit services. The service played a key part in assisting with citywide challenges such as the mass redundancies at Longbridge in 2005. After 2011, with pressures on Council budgets due to central government austerity cuts, the service has significantly reduced with two main offices in Northfield and Erdington together with staffing support in the Newtown Housing Options office. With over 30 trained advisors in this residual service they are still able to play an important role in the city's overall advice provision as has been seen with work they have undertaken during the Covid-19 pandemic over the last 18 months. The NAIS service is complemented by the commissioning of money and tribunal advice through the Legal Entitlements Advice Commissioning process delivering across the city.

8. Resourcing IAG advice services

IAG services are funded through a number of channels and moving forward there is a need even in the most challenging of funding environments to sustain funding levels and in some areas increase this whilst working more efficiently and collaboratively particularly on preventative and asset based approaches to achieve value for money and long term efficiencies. IAG provision across the city is funded through a mix of commissioning, grant aid, external funding, charitable giving, volunteering, social value and direct provision through providers' own revenue streams.

We heard the case for better commissioning, longer-term funding, advice and support on fundraising and being proactive on larger funding opportunities such as consortia approaches to large funders. There is a case for being bolder and more innovative in accessing funding.

This work has not been able to identify the total spend on IAG service though some account of the commissioning budgets has been made. One of the recommendations is that this should be undertaken in the first year of delivery against the strategic framework.

9. Socio economic context for delivering IAG services

We have produced a detailed socio-economic analysis of Birmingham covering deprivation (2019 Index of Multiple Deprivation), longitudinal crime, domestic abuse, child protection plans, adult social care safeguarding concerns, unemployment, claimant count, job density, annual pay, attitudes to debt, homelessness and rough sleeping, housing waiting lists and temporary accommodation. This is summarised in the analysis included in the appendices of the long version report.

10. Overview of provision by advice type, channel and geographic distribution

a. Mapping method

The starting point for our mapping exercise was to undertake desk research to identify existing published data on IAG services in Birmingham and data sets² made available to us from our stakeholder engagement. Where there was not clarity on the information available on-line we have double-checked our information with follow on calls to providers. Finally, we have run a reconciliation, eliminate duplication and updated organisational details where appropriate. We identified a number of organisations where follow on research is recommended.

We have ordered the listing of providers alphabetically whilst also identifying the advice types available, whether they are regulated and their contact details. This information is dot marked on the Birmingham map as an initial base level. However, we are currently developing an interactive map, which will enable clients and providers to identify by clicking on a number of categories – citywide, constituency, ward, advice type provided and whether they are accredited and regulated.

b. Analysis of provision

Birmingham has a rich tapestry of IAG service dispersed across Birmingham. Overall, there are on the current count 440 providers. This number whilst including some of the adult care providers will not include the vast majority of commissioned providers in this sector, all of which are required, through the commissioning service specification to provide an element of IAG service delivery. Of the 440 providers, 97% are from the voluntary and community with just three public sector providers. Further mapping for example with schools and colleges and employment IAG providers is recommended as well as with adult social care commissioned providers.









c. Geographical distribution



In terms of the location of key advice offices, we have identified and mapped five main clusters of advice – general and specialist advice hubs mainly in the city centre, general advice centres in two principal town centres, homeless hubs, LEAS commissioning and the ten constituency neighbourhood networks. This does not include the estimated 400 plus smaller community and voluntary organisations operating through commissions or their own resources. These are included in the IAG service directory and the digital interactive map. We have not been able to include commissioned providers delivering IAG as part of their service commissioning through Adult Social Care though it would be possible to add these at a later stage.

d. Demand analysis by advice type.

The demand analysis in the table below illustrates that in terms of functional advice types there is overall good provision with all advice types RAG rated green.

² Birmingham NNS Community Asset Directory (Connect to support)

ADVICE TYPE	PROVISION	ASSESSMENT RAG RATING
	Domestic Abuse Hub, Referral Agencies including Neighbourhood Offices, Voluntary and Community service providers alongside WMP, BCC mainstream services and primary care health services.	GREEN
	2 Adult Hubs, 1 Young Persons Hub and referral agencies / advice providers including Housing Options Centre/Neighbourhood Offices, Voluntary and Community service providers alongside WMP, BCC mainstream services and primary care health services.	GREEN
	Neighbourhood Offices, Housing Directorate, Voluntary and Community Sector Providers.	GREEN
	LEAS commissioned providers for money advice, tribunal and immigration advice, Neighbourhood Offices, Voluntary and Community sector provision.	GREEN
	Commissioned provision of care services with up to 400 providers building in an element of IAG provision, Supported and monitored by an IAG overview Board.	GREEN
	<i>Further analysis required</i>	
	LEAS commissioned providers, Birmingham Law Centre, Voluntary and Community sector provision.	GREEN
	Birmingham Adult Education Service and information referrals from linked services e.g. Community Libraries	GREEN

	Birmingham Careers Service, Schools and Colleges, Commissioned providers of careers services.	GREEN
	Birmingham Employment Service, Commissioned Employability Provison, Schools and Collges	GREEN

10. Regulated and accredited advice

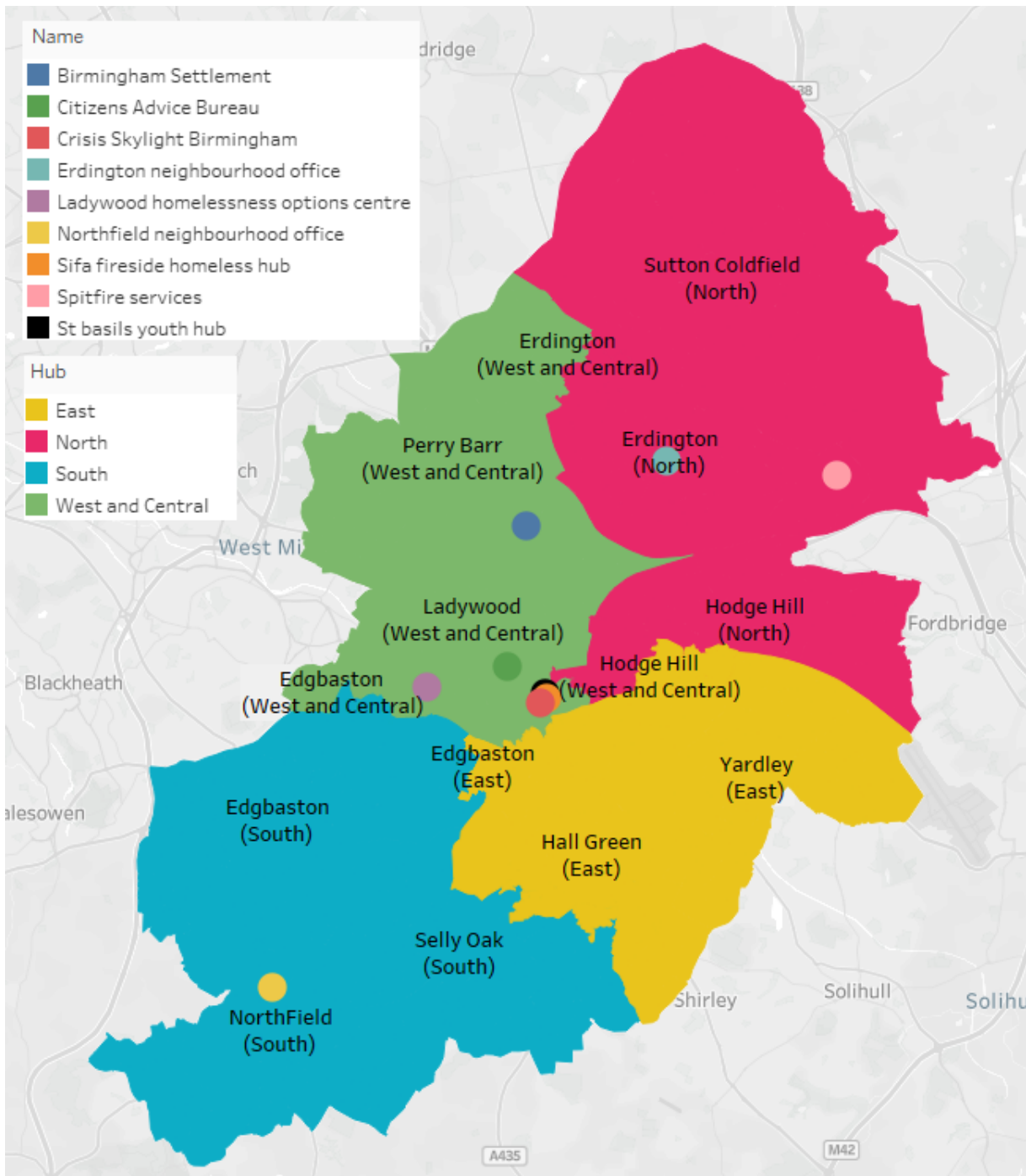
We identified 189 regulated providers (43%) with organisations such as the Housing Regulator, Care Quality Commission, or the Financial Conduct Authority. This means that 251 providers (57%) are unregulated. Of course, this does not mean that the quality of the advice provided by unregulated providers is of a lower standard than regulated providers, but it does provide a lower threshold of assurance. It also highlights the need, as part of the IAG strategy, to increase the numbers of regulated providers or to support smaller organisations through mentoring and other support to adopt the principles of regulation in their delivery including general accountability to their boards.

Equally, we have discovered there are several providers who hold externally accredited and verified quality marks such as Matrix, Advice Quality Standard etc. and organisations who may be delivering quality advice and support but they are not accredited to do this. This does highlight the need for a broader leadership role in the IAG Sector for supporting organisations to become accredited and sign up to a set of standards, which could be built universally into Birmingham City Council's commissioning strategies when procuring IAG advice and other related services. .

A number of the smaller community and volunteer led organisations are based in some of the most deprived communities in the city in inner and outer city wards and these are less likely have accreditation, suggesting that work in this sector needs to targeted. Some of the worst practice identified in the engagement work was reported in this sector.

11. Birmingham IAG Directory and Interactive Map

We have mapped at a base level the principal hubs and proposed areas for arranging the LEAS commissioning and wider IAG area networks. The IAG service directory organised in A-Z format is in the appendix alongside contact information and advice types and service channels covered by each provider in the appendices. This is supplemented by a digital interactive map, which will enable providers and clients to quickly ascertain different IAG provision at a city, constituency and ward level by type.



12. Vision and mission for Birmingham IAG Services

Our proposed vision and mission has been developed through the engagement work we have undertaken and analysis of the policy and operating context for Birmingham. The vision focusses on the outcomes that can be brought about through a strategic approach to IAG service delivery. The mission sets out how different providers in the IAG family can frame their operating culture, values and operating models and deliver the vision.

VISION

Better, more active and independent lives for Birmingham's citizens with lower demand for reactive crisis support.

MISSION

Delivering accessible, client-focussed, empowering, seamless quality advice services enabling people to resolve their issues and to lead independent lives.

13. Key Aims for Birmingham IAG Services

We have identified six key aims designed to organise activity around the delivery of the vision and mission in this IAG strategic framework. To take these aims forward we have made around 20 key recommendations and identify which aims they support by reference to the icons listed for each.

Key Aim 1

Raise the quality and standard of IAG advice through accreditation, regulation and wider accountability.

Key Aim 2

Improve the quality, speed and reliability of advice referrals across advice types and sectors.

Key Aim 3

Ensure that IAG advice is accessible to clients so that they can receive the right advice package they need through face2face, digital or telephone.

Key Aim 4

Strengthening the commissioning of IAG and wider provision building into service specifications an expectation of contributing to the leadership and coordination of advice services and mainstreaming IAG provision within wider service delivery.

Key Aim 5

Improve and invest in resourcing advice to enable long-term sustainable delivery across all provider sectors including public, charity and community.

Key Aim 6

Raise the profile of IAG advice and its connection into wider service delivery and operating models facilitating preventative and asset based community approaches.

14. Draft Principles Underpinning Birmingham Advice Provision

Through our engagement and analysis of advice practice within and beyond Birmingham, we have identified four key principles to shape the culture and working practice across the advice sector both by providers and by clients.

Principle 1: Person centred approach

Building advice around the needs of the client not the organisation providing the advice. Drawing on client centred theory³ developed for therapeutic and care practice “the client takes an active role in their support. The practitioner is non-directive and non-judgemental and their role is one of support. The client is in control of the intervention and determines the direction of the consultation. The practitioner facilitates self-understanding for the client and the client comes to a conclusion based on this.” This approach has been applied more broadly for example in careers development and can equally be applied in advice practice.

Principle 2: Partnership and mutuality

Working seamlessly to the principles of the proposed integrated advice pathway model. This entails the initial practitioner making a holistic assessment drawing on client centred practice

³ Carl Rogers, 1942 & 1951

of client's needs and agreeing a personalised advice strategy, which may entail referral to a specialist provider or to more than one provider.

Principle 3: Prevention and early intervention

Recent work by the Citizens Advice Birmingham⁴ suggests that there are three causes that leads to people getting into a deficit position in relation to challenges in their lives. The report outlines "advice is not offered at crucial times in people's lives...is seen as a last resort and does not help people respond to changes in their circumstances (and) is too narrow ...and fails to deal with wider issues such as housing and work". Whilst these points are made in relation to one advice type, – money advice – they could apply equally to other advice types. Good preventative practice across a range of services, including advice, can positively make a difference for example by getting someone into work can change the long-term financial wellbeing of a person or households circumstances. This may reduce demand on future money advice or benefits advice as well as improve wellbeing of the person and household reducing demand for advice and other services in this area. The Neighbourhood Network Scheme introduced in Birmingham has sought to bring a preventive approach to older citizens enabling them to remain independent for longer in their own homes and communities.

Principle 4: Empowering through asset based community development

Asset based approaches recognise and build on a combination of human, social and physical capital that exists within local communities. Asset based methods seek to balance the drivers of meeting needs and nurturing the strengths and resources held by people and communities. Birmingham's Neighbourhood Network Scheme has sought to develop such an approach with over 1200 community assets mapped for people and communities to engage with in a preventative approach to wellbeing. There is scope for developing this approach in relation to advice for example by centring volunteer and community advice provision in community assets and linking these in with established charities and public sector providers.

15. Establishing links with relevant city strategies

The IAG strategic framework, and the strategy it will inform, forms part of a suite of strategies that have been developed to give direction to public, voluntary, community and private sector agencies in Birmingham over the next three years and in particular assisting with the recovery phase relating to the Covid-19 pandemic. There is a strong correlation and set of interdependencies between these strategies. For example ensuring that Birmingham's citizens are digitally enabled is critical if we are to be able to provide effective advice, support to people into housing and employment and ensure their financial resilience and wellbeing.

The diagram below shows the alignment to other city strategies that interface with IAG service delivery. This is not an exhaustive list. A summary is provided within the fuller version of the framework document.

⁴ CAB, *The Preventative Gap, How money advice can help people avoid financial difficulties*, 2016 (accessed 26/8/21 from citizensadvice.org.uk)



PART 2:

Engagement Methodology and Findings

1. Key Findings

Key finding one: a need to improve the leadership and enabling role of larger providers both public and voluntary

Central to improving the role IAG advice can play in economic and social recovery is to bring different sectors and providers together to boost overall IAG capacity in the city. All providers have faced challenges over the last decade including public sector and larger voluntary sector organisations, but the change has been particularly acute in smaller voluntary and community based organisations. Our survey of advice providers indicated that several smaller providers were uncertain whether they would be able to sustain their operations beyond the current financial year with more uncertain over a two year period. One way of creating sustainability for smaller providers is to improve how the larger providers offer support to the smaller providers. It is not just an issue around funding, but also on the quality of service provision and being able to resource quality frameworks and regulation for smaller organisations. Smaller providers indicated that they would be keen to work and receive mentoring support from larger providers in this area.

Key finding two: resourcing and sustainability.

We found that the majority of organisations we engaged (78%) were funded by grants and charitable funding. Some three fifths of these advised that their funding is not guaranteed beyond 24 months and a fifth do not have sufficient funding to see them through the next 12 months. The funding issues are particular acute in the smaller voluntary and community sector. Larger voluntary organisations are keen that commissioned work is on a longer-term

footing – at least three years and ideally longer. With overall demand very likely to increase, it is imperative that a review is undertaken of the potential funding options for the wider IAG sector.

Key finding three: lack of collaboration and silo working

We found that there was a depth of overall IAG provision across the public, voluntary and community sector with a reasonable geographical distribution with a range of IAG service offers capable of meeting most advice needs from the Birmingham populace. However, despite good quality advice services being delivered from individual providers or within different genres of advice, there is a lack of coordination and partnership working between advice types, public, voluntary and community sector providers. Bringing the family of IAG advice providers together is a key focus of the recommendations and actions in this strategic framework. Clients who seek IAG services typically will have a range of advice needs that require a range of advice responses from more than one provider and across the genres of different advice available.

Key finding four: poor referral pathways for clients of IAG services

We had feedback that referrals between advice agencies were “hit and miss” with some good examples of successful referrals but equally cases that were getting lost in the system. From the service providers we spoke to over 80 per cent said that they had encountered issues with referrals. In part, it is likely that this is a consequence of a lack of coordination, lack of knowledge of what different agencies are providing amongst individual providers and clients. Another reason could be the diverse and fragmented nature of provision across the city with no agency having a lead around bringing all providers together. Clearly, the situation will not have been helped by ten years of austerity cuts affecting all sectors and the significant reduction in the city’s neighbourhood office network who historically provided a one-stop shop approach to advice. Service providers identified issues around data protection and safeguarding as being barriers/impediments to effective referrals. It is recommended that these two issues be picked up as a matter of urgency.

Key finding five: accessing advice services – poor information on how people can access IAG services

We heard strongly that people did not know how to access different IAG services across Birmingham. People had some knowledge of the larger brands of advice e.g., Citizens Advice Birmingham or provision by the City Council through the remaining neighbourhood offices; but not of the totality of provision across sector and type, in different parts of the city and through different service channels including face-to-face, telephone and digital/web. This was also the case for service providers who had reasonable knowledge of the larger brands and their own advice genre but not the whole picture. Clearly, this issue around service access is a barrier for people accessing services and potentially limiting the potential for specialist advice referrals.

Key finding six: a preference for face-to-face services

The importance of face-to-face advice to people wanting to access IAG advice is clear. Whilst there are good examples of how Zoom or Teams applications alongside telephone advice has worked during the pandemic the feedback, we received in the engagement process was that face-to-face delivery was the preferred channel. Clearly, the information element of IAG services can be more easily presented through online or distributed as paper copies. However, the advice and guidance components require the advisor and the client to build up a dialogue, identify the range of needs in play, options for addressing these through follow on

referrals and working out solutions to particular lines of inquiry for the client that are frequently best delivered through face-to-face contact.

Key finding seven: need to extend the number of providers who are regulated and accredited regulation

There is a good base of providers who have accreditation and are working in a regulated environment. However, there is room to increase the numbers across the wider IAG sector or at least to mentor and support smaller providers so that they work to the principles and best practice of accredited and regulated providers.

Key finding eight: high percentage of providers giving formal advice provision and a culture of collaboration and partnership

Our engagement with IAG providers saw the majority providing formal advice with fewer providing informal advice. However, it is likely that in the smaller voluntary sector and community sector providers that there will be greater numbers providing informal advice.

Key finding nine: high demand for money and welfare advice, housing advice and domestic abuse advice.

The most highly sought advice areas were money and welfare advice, housing and homelessness and domestic abuse support. Clients were satisfied with the outcomes and in some cases provided highly positive feedback on the quality of the service and of the work of individual advisors. It is quite clear that demand for these three advice types will continue over the next three years during the recovery from the Covid-19 pandemic. It would, therefore, be a priority to look at how these advice types are working and their resourcing needs moving forward. Equally, moving forward it is important to look at how early intervention and preventative approaches can ease demand on these services for example strengthening employment, careers and adult education IAG services.

Key finding 10: concentration of community sector service providers in the most deprived wards.

Our mapping has identified that the majority of community sector and smaller voluntary sector provision is concentrated in the most deprived inner and outer city wards. There is also a gap in provision in these wards from public and larger voluntary sector organisations. Providing the right support and ensuring that this sector is viable, sustainable and able to deliver quality advice including support and mentoring will be key moving forward.

Key finding 11: good practice amongst Neighbourhood Network Schemes (NNS)

These networks, with the possible exception of Northfield where the lead agency delivers advice services, focus on commissioning and enabling services to facilitate older adults living independent lives. They also play a role in connecting people to community assets and making appropriate advice referrals. NNS also provides a model of localised enablement that can be replicated in other service areas as well as an opportunity for area based IAG work to connect in.

Key finding 12: mainstreaming IAG delivery

Adult Social Care through their commissioning approach ensure that all providers incorporate an element of IAG delivery alongside a commitment to prevention and early intervention,

linking clients to community assets and a co-production model. This is a powerful example that can also be replicated in other commissioning contexts and other service areas.

Key finding 13: role of IAG services in the Covid-19 crisis.

The role of IAG providers in the Covid-19 pandemic has been critically important despite the challenges posed by limiting the provision of face-to-face services, which is a preferred channel for many clients across the sector. The needs that underpin the demand for IAG services have been amplified over the last 18-months. For example, with the increase in people losing work and the consequent debt, financial exclusion and health and wellbeing issues associated with this; or with vulnerable and older adults living independently but becoming more isolated and lonely with community asset facilities closing down, access to shops more difficult, public transport curtailed and outreach and face to face support services also more limited.

Key finding 14: role of IAG services in recovery from the Covid-19 crisis.

Moving forward out of the crisis, IAG provision will have a key role to play in recovery over the next three years. The first issue to take account of is that the crisis phase is by no means over with the current rates of infections despite the roll out of double vaccination. There remain parts of the city with lower vaccination rates and there may be a role to play with IAG services in making the case strongly to their clients to be vaccinated. Allied to this there is a role in supporting wider issues their clients are facing in relation to employment, benefits, wellbeing and physical and mental health alongside homelessness and domestic abuse. It appears nearly 160,000 people in Birmingham in receipt of Universal Credit will have lost their £20 a week supplement – over £1,000 a year, which will create further money and debt advice issues and exacerbating a range of other needs at the same time. Equally, the ending of furlough in late September may well have created further pressures on employment and the local economy placing extra demand on money and employment advice services alongside other advice services.

PART 3:

Key Recommendations and Actions

This section identifies 11 recommendations and 40 potential actions IAG service over the period covered by this strategic framework.

Recommendation 1: To develop an IAG leadership model drawing on best practice and learning from Birmingham's Neighbourhood Network Scheme.

Action 1: Scope out a potential operating model with funding options including the commissioning framework for LEAS advice.

Action 2: Running four x IAG forum areas annually on area level.

Action 3: Each IAG forum to link with the Constituency-based Neighbourhood Network.

Action 4: Developing and updating the IAG Directory on an area basis.

Action 5: Running bi-monthly training sessions on welfare rights and training.

Action 6: Coach and support voluntary and community organisations to enable them to access AQS accreditation.

Action 7: Attend and actively engage in the City Council's Financial Inclusion Partnership and its Advice and Information Sub Group.

Recommendation 2: To ensure sustainability and effectiveness of advice provision across different advice types and different providers.

Action 8: To model City Council budgets for direct IAG provision and commissioning budgets.

Action 9: To develop a financial health check / resilience model for voluntary and community sector organisations.

Action 10: To look at fundraising support advice for voluntary and community sector organisations delivering advice.

Action 11: To encourage a minimum of three year commissioning of third sector and community sector advice.

Action 12: To urgently explore a Birmingham consortium bid for money advice through MAP. Note this would entail delivering potentially at a regional scale.

Recommendation 3: Better commissioning of IAG services

Action 13: To develop a common commissioning framework.

Action 14: Consideration of specifying the provision of IAG service delivery in general service provision (building on the Adult Social Care model)

Action 15: Consideration of placing an expectation of providers playing an active role in relevant partnerships for example the Financial Inclusion Panel, Homelessness Panel etc.

Action 16: Specifying key city strategies' to take account of in service provision for example Digital Inclusion, Financial Inclusion, and IAG etc.

Action 17: Expectation to play an active role in area delivery networks for example Constituency Neighbourhood Network, Area IAG Forums.

Action 18: Develop and sign up to a Birmingham IAG charter and IAG service standards.

Recommendation 4: To look at the potential development of IAG Hubs building on existing Neighbourhood Offices, Homelessness Hubs and LEAS face-to-face services.

Action 19: Investigate how mobile pop up IAG advice could be made available in community assets.

Action 20: Link this to available assets held by Birmingham City Council including Adult Education centres, Community Libraries, Existing Neighbourhood Offices (for third and community advice providers) and Community Centres or assets held by third sector and community sector providers.

Action 21: Link this to the recommended IAG delivery areas.

Recommendation 5 – Develop a Birmingham IAG Service Directory

Action 22: Develop an approach for updating and further developing the Birmingham A-Z IAG Directory and communication and its dissemination of this through customer service channels (website, social media and paper copy) including IAG advice hubs.

Action 23: Develop a Birmingham IAG icon/hallmark and look at developing signage at Community Venues and Advice Hubs.

Recommendation 6: Develop an Advice Referrals Protocol

Action 24: Develop an advice referral protocol for IAG service providers.

Action 25: Ensure that referrals are discussed at key partnerships and Networks e.g. Financial Inclusion Partnership, Neighbourhood Networks, IAG area forums.

Action 26: Develop IAG provider data sharing protocols and training for this.

Action 27: Develop a standard digital and paper IAG referral pro-forma.

Action 28: Develop further the Inclusive Advice Pathways model.

Action 29: Review data sharing and safeguarding issues inhibiting cross agency referrals.

Recommendation 7: Develop a Birmingham IAG Advice Charter

An advice charter would set out clearly the vision and mission and aims of an IAG strategy and a commitment from providers across sectors to contribute to its delivery alongside linked strategies.

Action 30: Develop the charter and arrange a launch event for signatories.

Action 31: To include sign up to advice referrals inclusive advice pathways model, Birmingham advice policy statement and the Birmingham Advice Standards.

Recommendation 8: Birmingham Advice Standards and Policy Statement

Action 32: Develop draft Birmingham IAG provider's standards.

Action 33: Standard framework that includes the following key elements – service delivery, client-centred practitioner standards, delivery channels and referrals, professional standards, communication standards, performance and accountability.

Recommendation 9: Training and accreditation for voluntary and community providers.

Action 34: To undertake area based briefings on the key elements of the IAG advice framework.

Action 35: To develop targeted training for small voluntary and community sector organisations with modules on fundraising, business planning and standards.

Action 36: To develop wider training based on key topics in the IAG strategic framework including advice referrals, asset and preventive approaches and digital inclusion.

Action 37: To consider funding opportunities for actions 33 and 34.

Recommendation 9: Link to IAG Advice Strategy to Birmingham suite of strategies and Covid-10 recovery.

Action 38: To include in the initial area IAG briefings key information on related strategies and to build in potential more in-depth training.

Action 39: To profile the key role and contribution that advice services have played in the crisis phase relating to the Covid-19 pandemic and can play in wider recovery strategies.

Recommendation 10: Develop Asset Based Community Development approach with IAG advice.

Action 40: to consider how asset based approaches building on NNS and community led provision during the pandemic can inform longer-term approaches to IAG provision.

Action 41: to look how an asset based approach could be piloted in one or two advice areas to inform wider practice.

Action 42: to include assets based approaches to advice in training programmes.

Recommendation 11: To develop a digital platform / one stop shop for advice provision connecting providers and enabling clients to access IAG services

Action 43: To consider developing a sector wide IAG portal to improve information on IAG services and sharing best practice.

Action 44: To consider developing a sector wide IAG portal for undertaking secure inter agency advice referrals.

Recommendations 12: To create a IAG services stakeholders group to advise on the development of a future strategy and taking forward relevant proposals from the IAG strategic framework.

Action 45

2. Draft Key Measures of Success (KMS)

The following measures of success for the IAG strategic framework are proposed with views sought on any additional indicators that could be included as well as the specific measures required for each i.e. quantifying the level of improvements expected. Given the diverse and wide range of the IAG sector, it is recommended that these are kept high level and quantifying/specifying improvements may not be practical.

KMS 1

Improved referrals between IAG services.

KMS 2

Improved access to IAG services by clients.

KMS 3

Higher percentage of IAG providers who are accredited and regulated.

KMS 4

Numbers of smaller community and voluntary sector organisations working to the proposed Birmingham IAG service standards.

KMS 5

Improved collaboration across the IAG sector including sharing best practice approaches to external fundraising and commissioning.

KMS 6:

Fewer smaller IAG providers failing through lack of resources.

KMS 7

Improved commissioning of IAG provision securing sector leadership, preventative practice and asset based approaches.

KMS 8

Effectively contributing to recovery and ongoing crisis management in relation to the Covid-19 pandemic.