

Advising, Supporting, Empowering



Department for
**Social
Development**

www.dsdni.gov.uk

A strategy for the delivery of generalist advice services in
Northern Ireland 2015-2020

October 2015



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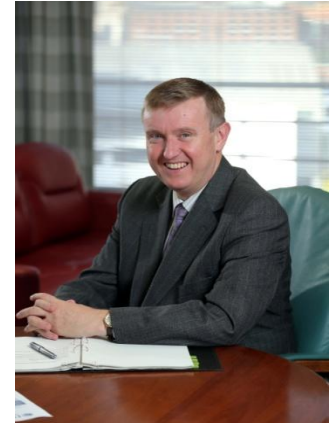
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Ministerial Foreword

As Minister for Social Development I am committed to having in place good quality advice services which are readily accessible to all. My work, and that of my Department, is about supporting and empowering people to help themselves and enabling them to access a range of support services which can help them improve their life chances. Generalist advice services are an important part of this support.



This strategy comes in response to the many changes that have taken place since the Opening Doors strategy of 2007. It also sets out a roadmap and structure to build upon, to manage the changes and challenges that lie ahead for those of us in central and local government and for the Advice Sector. Scarcer resources, new structures and responsibilities within local and central government, Welfare Reform and other new policies will affect us, as well as those to whom we provide valuable advice services. These challenges will necessitate changes in how we all do business to ensure we continue to provide advice services to people who need them. Closer working, alignment of services and eliminating duplication is increasingly necessary.

This strategy is underpinned by an action plan which sets out the strategy's priorities and a series of actions. The action plan will be developed throughout the lifetime of the strategy to help ensure it is able to respond to present and future challenges and needs. I will also establish a Steering Group to ensure the strategy and the action plan are implemented and that we continue to provide effective, affordable advice services.

Supporting people in a time of need is at the centre of everything we do. We also have a responsibility to help people for the longer term, to support and empower them to manage their own affairs and give them greater control over their own lives. Empowering people cannot be underestimated and we must look at how we deliver services that help more people to help themselves while ensuring those people with the greatest needs are catered for.

I want to pay tribute to those in the Advice Sector, many of them volunteers, who provide the vital frontline services to people. I want to see that they are supported and that they can deliver quality advice services to those with the greatest need. I want the Advice Sector in Northern Ireland to provide quality services that meet the changing needs of people in a modern digital age. This strategy is about looking forward, managing change and continuing to deliver modern quality advice services. I believe this new Advice Strategy will form the foundation for achieving these goals.

Mervyn Storey MLA, Minister for Social Development.

Executive Summary

Generalist advice services¹ provide valuable support and advice on issues like welfare benefits, housing, finance, consumer issues and employment issues. It involves the provision of initial broadly based advice services, with the option for referral to organisations which can provide more in-depth support. Generalist advice services are currently provided throughout Northern Ireland by Citizens Advice Bureaux and independent advice organisations who are members of Advice NI with the support of the Northern Ireland Advice Service Consortium which provides central support services.

There has been extensive stakeholder and public consultation undertaken in the development of this strategy and of its Vision, strategic objectives and priorities. Details of the consultation can be found on the department's website www.dsdni.gov.uk. The strategy comes at a time of significant and wide ranging change in both central and local government as well as in the wider policy environment through, for example, Welfare Reform.

This new strategy replaces the previous *Opening Doors* strategy. This strategy, will guide the delivery of generalist advice services, strengthening and supporting service delivery in a changing environment, over the period 2015 – 2020. It sets out:

- a new Vision and underpinning values for generalist advice provision;
- seven high level strategic objectives; and
- a number of key priorities.

These are summarised in the following paragraphs.

The Vision and values

The Vision for the provision of generalist advice services is “**To have in place accessible, quality generalist advice services for people in Northern Ireland.**” This Vision is underpinned by the values of impartiality, accessibility, quality, confidentiality, independence, effectiveness, accountability and being free to the recipient.

Objective 1: To empower and enable people to help themselves.

Empowering and enabling people to help themselves presents a real opportunity in terms of supporting people providing them with the tools, skills and confidence to better manage their affairs. There should be greater self service provision through tools and resources that inform, support and empower those who can help themselves and who want to.

¹ Generalist advice services are explained in the Glossary of Terms. References made to advice services in this document refer to generalist advice services unless otherwise stated.

The priorities are to:

- provide services in a way that empowers and enables people to better manage their own affairs; and
- increase self service provision and its use.

Objective 2: To have an aligned and complementary approach to the delivery of advice services.

Advice services need to be organised and delivered in a joined up, collaborative way that maximises the impact of scarce resources and eliminates duplication. Advice services should be aligned with the new councils and reflect central government restructuring. People should be referred to existing specialist support and advice services to provide them with the best, most appropriate service. The priorities are to:

- organise service delivery to take account of changes arising from the Reform of Local Government and the restructuring of government departments; and
- deliver efficient services that are aligned and minimise duplication and overlap.

Objective 3: To have a sustainable Advice Sector which maximises the impact of resources.

The sustainability of the Advice Sector presents a key challenge in a difficult budget environment with scarcer Public Sector funding. The Advice Sector will play a key role in facilitating change, by being innovative and actively considering actions which can help improve sustainability such as exploring alternative funding models, exploring alternative funding sources, being open to new service delivery models, reducing bureaucracy and using shared services. The priorities are to:

- find new and innovative ways to provide better value for money and make the best use of resources;
- enhance the sustainability of the Advice Sector; and
- consider a new model for representation services.

Objective 4: To maximise accessibility to quality generalist advice services.

Good quality advice services should be available to everyone in a way that meets their needs. A Northern Ireland Advice Quality Standard should be introduced as a guarantee for the public and funders. Digital and telephony services offer new and modern ways to deliver services providing people with ease and speed of access while at the same time freeing up skilled staff and volunteers to help those most in need. The priorities are to:

- ensure good quality advice services are available to those who need them;
- implement a Northern Ireland Advice Quality Standard across the Advice Sector;

- ensure services are readily available and easily accessed; and
- increase and promote the use of high quality digital and telephony services.

Objective 5: To encourage the role of the Advice Sector in contributing to the policy development cycle.

The Advice Sector, with its experience and evidence base, can make an important and positive contribution to the policy development agenda. It is important that central government, local councils and the Advice Sector work together to identify issues, develop interventions and build strategic partnerships. The priority is to:

- encourage the contribution of the Advice Sector to the policy development cycle particularly in terms of providing independent evidence based input and analysis.

Objective 6: To support the delivery of the strategy.

There is a need for effective arrangements to be in place to support the delivery of the strategy. These support arrangements include the provision of quality training services, consistency and accuracy in management information systems, an integrated communication strategy and good volunteer management. The priorities are to:

- ensure consistent training, reporting, IT systems and quality standards are in place across the advice network;
- develop an integrated Advice Sector communications strategy to support the changing advice environment; and
- develop volunteering within the Advice Sector.

Objective 7: To deliver the strategy.

Strong supporting structures will help ensure the implementation of the strategy and the participation and co-operation of stakeholders will be critical. An Action Plan will be developed setting out the priorities and a series of actions. A Steering Group will be established to oversee the delivery of the Action Plan and to review it regularly. Implementation of the strategy will be monitored and there will be mid-term and final evaluations. The priorities are to:

- ensure strong, effective engagement structures are in place to support the delivery of the strategy; and
- ensure the strategy and its associated Action Plan are implemented, monitored and evaluated.

Definitions and glossary of terms

Advice Sector	For the purposes of this strategy the Advice Sector in Northern Ireland is considered as comprising of the Northern Ireland Advice Service Consortium (Advice NI, Citizens Advice Regional Office and the Law Centre NI) and frontline advice organisations, mainly Citizens Advice Bureaux and independent advice organisations who are primary generalist advice providers and who are members of, or are affiliated to, Advice NI.
Central government	The Northern Ireland Executive Departments, their agencies and Non Departmental Public Bodies.
Council Liaison Group	The Council Liaison Group comprises representatives from all local councils that fund generalist advice services.
The Department	The Department for Social Development (DSD)
Departmental Advice & Information Group	The Departmental Advice and Information Group comprises representatives from business units within the Department for Social Development with an interest in advice services.
Digital services	For the purposes of the strategy digital services include online / internet based services, email and SMS text services.
Frontline advice providers	These are the staff and volunteers in organisations across Northern Ireland who are members of, or are affiliated to, the Northern Ireland Advice Service Consortium and provide generalist advice to the public as their primary role.
Government Advice and Information Group	The Government Advice and Information Group comprises representatives of all departments funding generalist or specialist advice in Northern Ireland.
Generalist advice providers	For the purposes of this strategy generalist advice providers are considered to be those organisations funded by DSD and councils to provide generalist advice services.

Generalist advice services	<p>For the purposes of this strategy generalist advice is considered to cover independent advice given in the categories of advice provided and recorded by the Northern Ireland Advice Service Consortium members and reported to DSD. These categories are:</p> <ul style="list-style-type: none"> • Welfare benefits • Money and debt • Housing • Immigration – Asylum • Legal • Family • Employment • Signposting • Consumer / General contract • Education • Health • Tax • Travel • Utilities • Tribunal representation and advocacy <p>Note that in categories such as debt, immigration, and legal “straightforward” cases can be dealt with by generalist advice providers whereas “complex” cases would be referred on to relevant specialist advice providers. It is for the generalist advice providers covered by this strategy and the relevant specialist advice providers to determine the point when referral is appropriate.</p>
Local government	The eleven councils.
Northern Ireland Advice Quality Standard	The proposed new Northern Ireland Advice Quality Standard developed by DSD and Northern Ireland Advice Service Consortium.
Northern Ireland Advice Service Consortium	The Northern Ireland Advice Service Consortium comprises Advice NI, Citizens Advice Regional Office and the Law Centre NI.
Public Sector	The Public Sector includes local councils, the Northern Ireland Executive Departments, their agencies and Non Departmental Public Bodies.
Regional Advice Services	For the purposes of this strategy regional advice services are considered to be the services provided for frontline advice providers such as training, quality standards, IT support and management information statistics.
Specialist advice providers/services	Specialist advice providers provide advice to a specific client group or on a particular issue. Specialist advice providers for specific client groups may provide some advice on the issues covered by generalist advice services. Examples of specialist advice providers include Housing Rights Service, Debt Action NI, Disability Action, Mencap etc.

1 The background and context

Background to the development of the Advice Strategy

1.1 The Advice Sector in Northern Ireland is considered as comprising of the Northern Ireland Advice Service Consortium (Advice NI, Citizens Advice Regional Office and the Law Centre NI) and frontline advice organisations, mainly Citizens Advice Bureaux and independent advice organisations who are primary generalist advice providers and who are members of, or are affiliated to, Advice NI. These are funded by the Department and by local councils. Arrangements for generalist advice services were covered by the *Opening Doors* strategy of 2007. Following an evaluation of *Opening Doors* it was clear that a new strategy was needed that reflected, amongst other things, the evaluation of *Opening Doors*, the changing policy environment, the increase in digital services and the likelihood of scarcer Public Sector resources. On this basis the development of a new advice strategy began.

The consultation process

- 1.2 The Department undertook an extensive programme of pre-consultation with stakeholders before publishing a consultation document in September 2014. A formal public consultation ran from 22 September to 14 December 2014. A number of stakeholder consultation events were also held during the public consultation period. A total of 129 people attended 15 consultation events and 66 written responses were received. Details of the consultation are on the Department's website www.dsdni.gov.uk.
- 1.3 This strategy presents a number of objectives and priorities in relation to the way ahead for generalist advice provision from 2015 until 2020. The objectives and priorities are based on the original proposals presented in the consultation document and on the responses received during the consultation process.
- 1.4 A Rural Proofing Statement and Equality Impact Assessment (EQIA) were published as part of the consultation. Both the Rural Proofing Statement and the EQIA have been reviewed to reflect the findings of the consultation with no significant issues identified. Both documents will be published with this strategy.

The broad policy environment

1.5 The new strategy will inform the provision of generalist advice services from 2015 until 2020. It is clear this will be a period of substantial change which will have a significant impact on delivery of advice services in Northern Ireland. This will be a time of

unprecedented change in local government and the introduction of a number of significant new government policies. All of this comes at a time when there are scarcer Public Sector resources and a stronger than ever need for 'joined up' service provision and aligned and complementary services.

Reform of Local Government

- 1.6 The Reform of Local Government saw the formation of 11 new councils. From April 2016 it will be for the 11 councils to determine their needs for generalist advice provision and commission appropriate services. Councils should have due regard to this advice strategy and work with stakeholders to ensure the generalist advice services which councils fund are aligned with the central support and specialist advice services funded by departments.

The Planned Welfare Reform Programme

- 1.7 The planned Welfare Reform Programme will see significant changes to the Social Security benefits system. The Department is conscious of the potential impact of the new Welfare Reform Bill and is working to mitigate the most difficult aspects of these changes, whilst at the same time putting in place the necessary support mechanisms to assist the most vulnerable. Going forward, there will be a move to much greater use of digital services and the Advice Sector will need to work closely with the Department to ensure service delivery is maintained and that customers are supported during these significant changes.

Digital Services / Accessibility

- 1.8 As a consequence of increased internet usage, and a greater focus on digital and telephony services by government, the preferred method of contact for advice services should be by use of telephony and digital channels whenever possible - while ensuring that advice is also accessible to more vulnerable people or those unable to use telephony and digital channels. Online based services especially lend themselves to a self service approach enabling people to get information and advice quickly when they want it. [nidirect](#) enables people to access information on a range of government services such as benefits, tax and employment. To avoid duplication advice providers should help and encourage people to make use of these government services and other services where possible.

Building financial capability and independence

- 1.9 The Department of Enterprise, Trade and Investment has a Financial Capability Strategy² for Northern Ireland. The strategy is one of a series of Northern Ireland Executive interventions designed to break the cycle of deprivation, educational under-achievement, and economic disengagement, and to improve the health and well being of our population.

² DETI - NI Financial Capability Strategy Consultation <https://www.detini.gov.uk/consultations/ni-financial-capability-strategy-consultation>

- 1.10 Financial capability is about people having the skills and confidence to manage money effectively, and being able to access support and advice on money management issues when required. DSD supports the Financial Capability Strategy and there is a role for DSD and for the Advice Sector in its implementation.
- 1.11 Consideration must also be given to the Social Security Agency Financial Independence Strategy. This aims to assist customers of the Social Security Agency achieve and maintain financial independence by giving them support and advice, including access to appropriate financial products and services.

Department of Justice 'Access to Justice Review 2'

- 1.12 The Department of Justice 'Access to Justice Review 2' aims to produce effective and affordable access to justice and legal aid systems, which help resolve disputes at the earliest possible stage, consistent with sustaining the quality of justice. The review will identify and prioritise delivery models that might be best suited to the provision of publicly funded legal services including through mechanisms other than legal aid. The review wishes to explore possible delivery of some services through the advice network.

Restructuring of Departments

- 1.13 The proposed restructuring of government departments from twelve to nine in 2016 may see the reorganisation and reprioritising of work as well as significant changes in policy responsibilities.

Objectives

- 1.14 Seven strategic objectives for this Advice Strategy were identified and agreed upon through the consultation process. They are:
- 1 To empower and enable people to help themselves.
 - 2 To have an aligned and complementary approach to the delivery of advice services.
 - 3 To have a sustainable Advice Sector which maximises the impact of resources.
 - 4 To maximise accessibility to quality generalist advice services.
 - 5 To encourage the role of the Advice Sector in contributing to the policy development cycle.
 - 6 To support the delivery of the strategy.
 - 7 To deliver the strategy.

These strategic objectives, together with the Vision and values, are detailed in the following chapters.

Vision and values

2.1 The Vision for the provision of generalist advice services is:

“To have in place accessible, quality generalist advice services for people in Northern Ireland”.

2.2 This Vision is underpinned by the following values:

- **Impartiality** – Provide an impartial service to everyone regardless of race, religious belief, political opinion, age, sex, sexual orientation or disability.
- **Accessibility** – Provide an accessible service to everyone.
- **Quality** – Provide advice to a recognised quality standard.
- **Confidentiality** – Provide a confidential service to clients and meet all data protection legislative requirements.
- **Independence** – Be independent of political parties, statutory organisations and government. Be free from political interference and any conflicts of interest.
- **Effectiveness** – Provide an effective service to all clients and the community and show effectiveness through demonstrable and measurable outcomes.
- **Accountability** – Provide a service which is accountable to users and others who work with advice providers.
- **Free to the recipient** – All generalist advice should be provided at no cost to the recipient.

*Consultees said:
Quality should be
added to the values
for the strategy.*

3 Objective 1: To empower and enable people to help themselves.

3.1 This strategic objective recognises that empowering and enabling people to help themselves presents a real opportunity in terms of supporting people, enabling them to be more self reliant and improving their life opportunities. It is the cornerstone of this strategy. Building confidence, knowledge and skills presents the best opportunity to ensure that people can manage their own affairs and advice services can play an important role in supporting this. This strategic objective is geared to ensure that people have the knowledge, skills and tools, which will enable them to help themselves and to readily access services when they need to.

Empowering people

3.2 It is crucial that funding organisations and advice providers work together to provide people with the skills and confidence to manage their affairs. For example, this can be achieved by supporting people in developing their budget and money management skills, empowering them to manage their financial affairs. Empowering people can often help tackle disadvantage and some forms of social and financial exclusion. Empowered people contribute to and help build empowered communities.

3.3 With this in mind, it is clear that there is a need to consider new approaches to delivering advice services. A move away from providing mainly reactive support to providing advice, which enables people to help themselves build their confidence, their skills and gives them greater control over their own lives. In this age of technology when people conduct much of their business through digital and telephony channels, services should be geared to enable people to access advice services in this way. People should have access to a range of information and tools so that those who are in a position to help themselves have services available that readily enable them to do so.

Self Service Provision

3.4 Digital services, which are increasingly becoming the norm, offer opportunities for advice provision to be made available in a faster, more efficient and more convenient way for people. Online based services especially lend themselves to a self service approach, enabling people to get information and support quickly and when they want it. The provision of online self service tools is increasingly used to deliver services – such as those provided on nidirect. The Advice Sector already provides a significant level of online self service tools and resources including information, calculators, forms, letter templates and budgeting tools. This strategy recognises that, going forward, we need greater self service

provision that informs, supports and empowers those who can help themselves and want to.

- 3.5 Generalist advice providers should seek to increase self service provision for advice services and promote its use, being mindful to signpost to other existing services. This will benefit people who prefer to use online services and at the same time free up skilled advice staff and volunteers to deal with more vulnerable customers or for people for whom self service would not be suitable.

Priorities:

- provide services in a way that empowers and enables people to better manage their own affairs; and
- increase self service provision and its use.

4 Objective 2:

To have an aligned and complementary approach to the delivery of advice services.

- 4.1 This strategic objective recognises the need for advice services to be organised and delivered in a joined up collaborative way that maximises the impact of scarce resources and minimises duplication. It recognises the specialist support and advice services that exist and the need to refer people to them to provide the best outcome and make best use of what already exists. It also takes account of the need for the new councils, the Advice Sector and central government to align the services they fund or provide.

Aligned and complementary services

- 4.2 Over the past number of years there has been substantial investment, by government departments and others, in advice provision. There are complex and multi faceted linkages and relationships between advice funders in central and local government, regional support services and the frontline advice providers. This complexity is reflected in a range of supporting structures that currently exist to support and develop advice provision in Northern Ireland. The challenges of the overall policy environment, and pressures on funding, make it more important than ever that services are aligned and complementary. Going forward it is vital to work collaboratively not competitively and to look at better ways of delivering both central support and frontline services.

- 4.3 Funders should seek to ensure services are complimentary and never conflicting. Arrangements should be in place to eliminate in so far as is possible the duplication of services. This should extend to services that are funded or provided outside the Public Sector or outside the Advice Sector - for example services that are provided on [nidirect](#) or that are funded by, for example, Big Lottery projects. Funders and advice providers should align, simplify and streamline the present mechanisms to work closer, more collaboratively and avoid duplication.

*Consultees said:
Streamline the
complex relationships
between regional, local
and specialist advice
providers and central /
local government.*

- 4.4 The Reform of Local Government saw the formation of the 11 new councils who will determine their needs for generalist advice provision and commission appropriate services. Forging strong relationships with councils, for example through the Community Planning process, provides the Advice Sector with the opportunity to align its structures and provide the services the councils determine are needed.

- 4.5 The Advice Sector should seek to align its structures towards reflecting the 11 new councils and the advice services they determine are needed. Councils should have due

regard to this advice strategy and work with central government to ensure the generalist advice services they fund are aligned with central support and specialist advice services funded by central government.

Signposting and making referrals

- 4.6 Funders and the Advice Sector have a responsibility to work collaboratively in order to maximise the impact of scarce resources. There is a need to have clearly defined roles and responsibilities, to pool resources and to simplify or minimise duplication of service provision for example, by introducing a seamless referral process. The challenge is to determine when it is appropriate to make referrals to specialist advice services or signpost to other existing services - for example to the Social Security Agency Improving Benefit Uptake service, to Debt Advice services, to Housing Rights services and to Social Security Offices.
- 4.7 Government and advice providers should make greater use of signposting and referrals to ensure more people get quality advice at the right time from the most appropriate provider and to make best use of the services that already exist. The Advice Sector and government should work together to ensure seamless referral systems are in place between the different services.

Priorities:

- organise service delivery to take account of changes arising from the Reform of Local Government and the restructuring of departments; and
- deliver efficient services that are aligned and minimise duplication and overlap.

5 Objective 3: To have a sustainable Advice Sector which maximises the impact of resources.

- 5.1 This strategic objective recognises that, in the coming years, there is likely to be a challenging budget environment. The sustainability of the Advice Sector therefore presents a key challenge. Scarcer Public Sector funding and the impact of the Reform of Local Government will give rise to a need to change the way advice services are delivered. The Advice Sector will play a key role in facilitating change, by being innovative and actively considering actions, which can help improve sustainability such as exploring alternative funding models, exploring alternative funding sources, being open to new service delivery models, reducing bureaucracy and using shared services.

Working collaboratively and making best use of resources

- 5.2 The Advice Sector presently consists of over 40 independent local and central organisations. While the independence of these organisations is recognised, the pooling of resources and adopting common systems for IT, finance, training and other back office services, offers potential to reduce costs and provide more cost effective organisations and delivery models. There is a need to improve levels of co-operation to rationalise, minimise, and ideally eliminate duplication and make greater use of signposting. Working collaboratively, both within the Advice Sector and more widely with funders and specialist service providers, can make better use of limited funding and improve service delivery for people.
- 5.3 The Advice Sector should seek to make the best use of existing resources, optimising the impact of these resources, providing streamlined, value for money services that are attractive to funders and meet their needs. Working collaboratively should be the norm for Advice Sector organisations and their funders. Funders and the Advice Sector should seek to develop new and innovative ways to deliver current services.

Sustainability

- 5.4 The Advice Sector has considerable reliance on Public Sector funding especially for the delivery of generalist advice services. Within the Advice Sector there are skills and expertise that have been used to successfully bid to deliver other more specialist services. The Sector has demonstrated its ability to diversify and generate new income whilst maintaining its independence. The strategy recognises opportunities for large scale alternative funding sources for generalist advice provision may be limited. Achieving sustainability is often about creating a balance of increasing income and reducing costs.

Making the best use of existing resources and increased collaboration can make a significant contribution towards the sustainability of the Advice Sector.

- 5.5 Options for diversification and income generation should be explored to increase the sustainability of the Advice Sector and reduce reliance on Public Sector funding. The uniqueness of the services provided, the special skills set and expertise of advice providers should be utilised and promoted by central support services. Central support organisations should use their expertise to help frontline advice providers identify and develop new sources of income generation to increase their sustainability. Advice organisations should explore alternative funding models and opportunities for collaborative working as a means to improve sustainability within the Advice Sector. The Advice Sector should seek to develop new services that provide advice in a changing policy environment.

Representation services

- 5.6 This strategy recognises the challenge role of the appeals process, especially for social security benefits, and the need for appropriate representation. Appeals representation is not offered by all advice providers. Where it is offered it tends to be a resource intensive process often with limited numbers of trained staff available. Improved communications between the Social Security Agency and the Advice Sector may reduce the number of cases going to appeal in the first instance meaning quicker resolution for clients and reducing workloads for all parties.
- 5.7 There should be a review of the current arrangements for appeals representation. A model should be developed that considers ways to reduce the number of cases going to appeal in the first instance and ensures greater consistency in the availability of appeals representation.

Priorities:

- find new and innovative ways to provide better value for money and make the best use of resources;
- enhance the sustainability of the Advice Sector; and
- develop a model for representation services.

6 Objective 4: To maximise accessibility to quality generalist advice services.

- 6.1 This strategic objective recognises the need for good quality generalist advice services to be readily available and to those who need to access them. Quality advice services should be available to everyone regardless of their circumstances or where they live and in a way that reflects both convenience and need. At a time of substantial change and pressures to provide good value for money, there is a need to adopt new and modern ways to deliver services reflecting the way people access services and information. Digital and telephony services in particular offer people ease and speed of access while at the same time freeing up skilled staff and volunteers to help those most in need.

A Quality Standard

- 6.2 Quality in advice provision is a fundamental part of the service and is an absolute requirement to meet people's needs. The need to provide high quality services by trained staff and volunteers to an agreed quality standard is widely accepted. Quality standards are a guarantee to people using the service that the information and support they receive is appropriate, accurate, timely and fit for purpose. A quality standard provides the public and funders with assurance about the quality of advice being provided and the competency of the organisation providing it. An advice quality standard needs to be rigorous, clear and consistent, capable of continuous improvement and independently auditable.
- 6.3 A quality standard should be adopted across the Advice Sector. It should be agreed with stakeholders, including funders, to ensure its suitability. Funders in central and local government should only provide public funding for generalist advice provision to organisations that meet the quality standard.

Face to face services

- 6.4 Face to face advice services are an important method of delivery for advice services especially for those people who have greater needs or whose case is more complex. However, face to face services are generally more resource intensive than other methods of service delivery. The increased use of digital services and telephony to deliver advice services offers the opportunity for precious resources to be diverted to providing face to face services for those who need them most.
- 6.5 Face to face services should continue to be one of a range

*Consultees said:
Balance needs to be
achieved between
digital / telephony and
face to face services.*

of methods used to deliver advice services. Advice providers should focus face to face advice provision on those who need it most.

Digital and telephony services

- 6.6 Telephony services are used extensively by the Advice Sector. In 2014/15 133,019 enquiries were dealt with by telephone. A further 8,815 enquiries were dealt with by e-mail. People are also accessing advice information online with almost half a million visitors viewing almost 3 million pages of information on the Advice NI and Citizens Advice Bureau suite of websites. It is important to note that the provision of information is generally a one way communication whereas the provision of advice generally involves a two way conversation. Digital and telephony services provide people with greater choice and convenience. They can also offer advice providers with less resource intensive ways to deliver services.
- 6.7 Internet usage continues to grow in Northern Ireland and OFCOM reports³ that 80% of homes are now connected to the internet with 75% of people with internet access sending emails and 68% purchasing goods and services. The drive by government to provide a greater range of services and information online offers people a self service option coupled with choice and convenience. However, digital services have some limitations, for example, the lack of internet or email access or the skills or willingness to use them.
- 6.8 High quality digital and telephony services offer choice and convenience for people and, along with face to face, are the key ways to deliver advice services. The increased use of digital services and telephony to deliver advice services will afford the opportunity for precious resources to be diverted to providing face to face services for those who need them most. While the delivery method should reflect the need, the focus should be on enabling those who can help themselves to do so.
- 6.9 The provision of digital advice services should grow to meet the growing numbers and expectations of people using digital and telephone services and reflect the growth of digital services generally. People should be signposted to digital and telephony services where possible. Triage systems for initial advice queries should be encouraged to enable signposting people to readily available information thus enabling those who can, to help themselves.

Priorities:

- ensure good quality advice services are available to those who need them;
- implement a Northern Ireland Advice Quality Standard across the Advice Sector;
- ensure services are readily available and easily accessed; and
- increase and promote the use of high quality digital and telephony services.

³ Ofcom Communications Market Report Northern Ireland – August 2014

7 Objective 5:

To encourage the role of the Advice Sector in contributing to the policy development cycle.

- 7.1. This strategic objective recognises the important and positive contribution which the Advice Sector can make in contributing to the wider policy development agenda. The strategy recognises the independent voice of the Advice Sector and the evidence based input it brings to the development, review and evaluation of policy. It is important that central government, local councils and the Advice Sector work together to identify issues, develop interventions and build strategic partnerships.
- 7.2. The Advice Sector, especially frontline providers, has firsthand knowledge and experience relating to generalist advice provision. Coupled with robust statistical data this forms a sound evidence base from which to draw a well reasoned analysis of present issues and helps identify new emerging issues to bring to the attention of policy makers.
- 7.3. The Advice Sector should contribute to the development, review and evaluation of both central and local government policy relating to generalist advice provision. Policy makers should seek the contribution of the Advice Sector as part of the policy development process. Local frontline advice providers should engage with councils in helping shape local advice services through, for example, the Community Planning process. Specialist advice providers might also contribute to policy development and their contribution should be sought where appropriate.
- 7.4. Good, effective working relationships and communication processes within the Advice Sector are needed to ensure policy makers receive coherent, evidence based views from across the Advice Sector, including frontline advice providers. Engagement structures between government and the Advice Sector should reflect the role of the Advice Sector in contributing to policy development.

*Consultees said:
Local advice providers
should play a part in
shaping local services
through the Community
Planning process.*

Priorities:

- encourage the contribution of the Advice Sector to the policy development cycle particularly in terms of providing independent evidence based input and analysis.

8 Objective 6: To support the delivery of the strategy.

- 8.1 This strategic objective recognises the need for effective arrangements to support the delivery of the strategy. Support arrangements include the provision of training services, consistency and accuracy in management information systems, an integrated communication strategy and good volunteer management.

Training

- 8.2 There is a need for ongoing quality training for staff and volunteers, especially for people delivering frontline advice services. Training needs and provision should be regularly reviewed to ensure training continues to be relevant and fit for purpose. A wide range of training is provided within the Advice Sector and across the wider Voluntary and Community Sector. There should be no duplication of training provision in the Voluntary and Community Sector funded from the public purse.
- 8.3 Training for advice providers should be consistent, fit for purpose and to a standard that is set out in an agreed quality standard. Training providers in the Advice Sector should not duplicate or overlap their training services or those provided in the wider Voluntary and Community Sector.

Management Information

- 8.4 It is in the interests of the Advice Sector and its funders to have in place processes and systems that provide consistency and accuracy in the collection, recording and reporting of management information. These enable robust statistics to be collected which can be used within the Advice Sector to identify trends and evidence need as well as providing funders with the accurate monitoring information they need. Accurate and consistent management information helps build a robust evidence based need for services and provides assurance that value for money services are in place.
- 8.5 There should be consistency and accuracy in the processes and systems in place within the Advice Sector in the collection, recording and reporting of management information. Accuracy and consistency of management information and statistics should be part of the quality standard. Monitoring reports to funders should be accurate, timely and robust.

A Communications Strategy

- 8.6 The lifetime of the strategy will see a period of significant change and it will be more important than ever to work together to deliver services. The implementation of policies, in particular the Reform of Local Government, will change the dynamics of many relationships as well as the needs, roles and responsibilities of central and local government and the Advice Sector.
- 8.7 There should be an integrated communication strategy that reflects and supports the changing advice environment. This communication strategy should cover the relationships between frontline advice providers, local councils, central support services and government departments and reflect the engagement structures that are in place.

*Consultees said:
An integrated
communication policy is
required for all
stakeholders and
funders.*

Volunteering

- 8.8 The importance of volunteers within the Advice Sector is widely recognised as is the investment in their training – especially that of frontline advisers. Good volunteer management can help ensure the retention of experienced volunteers and the ongoing involvement of volunteers within the Advice Sector. In line with the DSD Volunteering Strategy⁴ the Department is keen to ensure volunteering flourishes within the Advice Sector.
- 8.9 The Advice Sector should improve its volunteer management, increase the number and quality of volunteering opportunities and support the development of skills by its volunteers.

Priorities:

- ensure consistent training, reporting, IT systems and quality standards are in place across the advice network;
- develop integrated Advice Sector communications strategy to support the changing advice environment; and
- develop volunteering within the Advice Sector.

⁴ [Join In, Get Involved: Build a Better Future. A Volunteering Strategy and Action Plan for Northern Ireland.](#)

9 Objective 7: To deliver the strategy.

- 9.1 This strategic objective recognises that delivery of the strategy requires clearly defined processes, structures and plans. The participation and co-operation of stakeholders is critical for the strategy's implementation.

Developing an Action Plan

- 9.2 There is widespread recognition for the need to develop an Action Plan which will underpin the strategy and its implementation. The Action Plan must be adaptable and be able to respond to changes that may happen over the lifetime of the strategy.
- 9.3 An Action Plan will be developed setting out the priorities, key actions, measurement options, timescales and identify leads for delivering each of the actions. The Action Plan will be a living, evolving document that can be adapted to reflect changing priorities, needs and circumstances.

Establishing an Advice Strategy Steering Group

- 9.4 DSD will establish a Steering Group to oversee the implementation of the Action Plan and monitor the strategy's delivery and evaluation. The Action Plan will be regularly reviewed by the Steering Group. The cross cutting nature of all types of advice provision should be reflected in the makeup of the Steering Group. There is a need to ensure the transparency and accountability of the Steering Group and its activities.
- 9.5 The Steering Group will be chaired by DSD and should include representation of frontline generalist advice providers, central advice support services, specialist advice service providers and funders of advice services in central and local government.

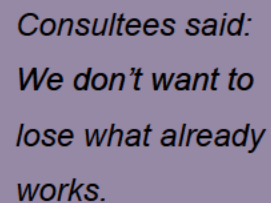
*Consultees said:
Representatives from
specialist advice
services, in addition
to generalist advice
services, should be
on the Steering
Group.*

Monitoring and evaluation

- 9.6 Regular monitoring and reporting on the implementation of the strategy will be undertaken throughout its lifetime. The key monitoring role will be undertaken by the Steering Group. The Steering Group will regularly report on the strategy's implementation and progress against the Action Plan.
- 9.7 Evaluation of strategies is part of the normal policy development cycle. An evaluation of the strategy will be undertaken mid-term and a report with any relevant recommendations will be produced. A final evaluation will be completed at the end of the strategy period.

Engagement structures

- 9.8 It is widely recognised that strong, effective engagement structures are needed. This will help ensure the strategy is successfully implemented, will address future challenges and will maximise future opportunities. A number of engagement structures presently exist. These include the Departmental Advice and Information Group, the Government Advice and Information Group and the Council Liaison Group.
- 9.9 The existing engagement structures should be reviewed to ensure they remain fit for purpose. This helps minimise the potential loss of expertise and experience and helps minimise the breakup of existing effective networks. The review should take account of the establishment of the new councils, restructuring within central government and have regard to future policy developments impacting on advice services. The need to provide aligned and complementary advice services should be reflected as part of the review.



*Consultees said:
We don't want to
lose what already
works.*

Priorities:

- ensure strong, effective engagement structures are in place to support the delivery of the strategy; and
- ensure the strategy and its associated Action Plan are implemented, monitored and evaluated.