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# Making Advice Work grant funding plan

## PLAN AS TO CRITERIA

This plan includes 3 streams of funds under which applications will be sought by the Board in line with funding priorities agreed with funders for this programme. The plan sets out the specific priority outcomes which relate to each stream under which funds will be allocated. It also specifies that across all 3 Streams, a core focus will be on projects that can clearly demonstrate how they will meet identified priority needs in a way that complements and does not duplicate existing provision.

**Stream 1** of the programme is designed to focus funding on projects that help connect people across a geographic area with assistance in resolving complex benefit and related debt problems, and projects that include targeted assistance to help people successfully make the transition to the new benefits system. This could also include projects capable of providing advice and information on a nation-wide basis (for example across a range of advice and support providers) to promote achievement of these aims for people. These projects can tackle unmet need and connect to and add value to existing arrangements for advice, information and representation. There is a maximum of around **£3.95m** expenditure available under Stream 1, with £2.6m of expenditure approved by the Scottish Government to support achievement of their aims in respect of helping people affected by welfare reform, and £1.35m approved by MAS to support achievement of MAS's strategic aims in respect of tackling financial problems and complex debt.

**Stream 2** of the programme focuses specifically on advice, information and representation for tenants of social landlords as a result of changes to the benefit system, including avoiding homelessness and tackling housing debt problems. There is a maximum of **£2.5m** available from the Scottish Government for expenditure on projects under Stream 2.

**Stream 3** is a thematic stream and the main aim is to improve access to direct assistance to avoid/resolve problems formally or informally for particular groups of people. We invite applications under the thematic strand which would test options for achieving sustainable outcomes for them in holistic/multi-disciplinary ways - for example including partnerships between support agencies and specialist advice providers at national/regional level. A maximum of **£1m** expenditure has been approved by MAS for projects under Stream 3.

In determining which projects will receive funding, the Board will measure the extent to which applicants meet these criteria and priorities according to how clearly they can demonstrate relevant attributes and articulate relevant characteristics. These attributes and characteristics will be set out separately in detailed guidance for applicants and will be tailored to the criteria and priorities in this plan for each stream. All applicants will be asked to demonstrate a focus on delivering the relevant priority outcomes. For streams 1 and 2, they should demonstrate effective alignment with local arrangements, while stream 3 applicants should demonstrate potential to achieve strategic impact.

In addition, across all Streams the Board will be looking for evidence of the project's ability to deliver effectively, in terms of strong project management and organisational governance arrangements; experience and expertise in the delivery of quality help within the project remit; an appropriate budget and relevant financial controls; and a commitment to promote equality, accessibility and diversity.

In reaching final decisions, as well as considering each application on individual merit, we will consider how to best build a programme of projects that together will achieve the aims agreed with our funders.

### **STREAM 1- COMMUNITY-WIDE HELP**

#### **Eligibility**

We will welcome applications under Stream 1 from organisations well placed to directly deliver the advice provision within the project remit; including local authority advice providers, third sector organisations, and law centres. We particularly encourage partnership applications which encourage and embed co-ordinated provision of advice and where organisations play to their respective strengths.

#### **Priority outcomes against which funding will be allocated**

**Stream 1** of the Making Advice Work funding programme will prioritise the following:

- Improving access to information, advice and representation to help people access all the welfare benefits they are entitled to under the new statutory framework (provided by DWP and local government), including funding for support such as training people/organisations:
  - Where people encounter problems related to transition from the old system to the new system we want them to have access to advice and representation from quality independent advice providers (casework/negotiation/representation/support to move online or with budgeting)
  - Where problems cannot be resolved, we want to enable access to direct assistance for representation and help with appeals
- Improving access to help for people on benefits and low income who are at risk of financial problems related to debt (for example as a result of the transition from one system to another). This help should focus on:
  - Helping to avoid escalation of problems and to make the solution as sustainable as possible so that in the longer term the individual and their family have improved life chances and we are tackling inequalities in society.
  - Enabling access to help with debt and related problems that flow from the impact of welfare reform (for example with debt or eviction related problems as a result of reduced benefit levels)

Under Stream 1, we expect to fund projects that provide up to Type III assistance and representation in benefits issues and up to Type III assistance in related debt matters.

The differences we want projects to make are:

- People affected by the welfare reform programme, are connected to advice and casework assistance to avoid benefit problems occurring and help resolve those that do

- people who are engaged in the review or appeal process for social security benefits should have access to:
  - Advice about what is likely to happen during the review/appeal process including advice about options and likely consequences of these so they can make informed choices about proceeding or not
  - Where appropriate and proportionate, access to representation in tribunal to assist in resolution of the social security problem
- People are able to access advice and casework services to achieve sustainable resolution of debt issues, including those which could lead to court action, or homelessness in the future if left unresolved

The project's advice services will be available and accessible to all communities and groups living within the project's area facing these priority problems, and will reflect their needs

### Priority project types

The priority services for funding in Stream 1 are:

- projects that provide advice services that tackle benefit problems, multiple and serious debt issues and support access to new benefits
- projects that provide assistance to people facing review or appeal processes before the day of the hearing itself and provide representation at tribunal hearings
- projects which will provide a specialist hub of assistance to which other existing agencies can refer more complex work, and which will provide support during the transitional period of welfare reform for local agencies
- projects which will add value to and not duplicate local planned activity - including those that add value to preventative and early intervention strategies

### Priority coverage

Our aim is to fund projects that will lead to as broad a geographic coverage of these areas of assistance as possible (taking into account the existence of other advice provision such as that funded by the Board or local authorities).

We are looking to fund projects that can provide a service across at least single local authority area. These projects should provide a focus of more specialist help which would take referrals in from a broader range of services, or would help to add capacity to existing provision which is already a core provider of casework and representation in that area.

We are also looking for projects that will take a co-ordinated and targeted approach to delivery of help to meet priority needs; with priorities around assisting people affected by specific transitions in the welfare system e.g. the transfer from DLA to PIP, and changes to benefits related to joblessness and low pay.

The project should also be used as a focus for targeting effort at particular points in the project timescale to focus on introduction of new benefits, or to support access to accurate advice on the impact of transition between benefits, transitional protection, or the impact of changes in circumstances during the transitional "twin-tracking" phase of welfare reform.

Preference will also be given to projects that act to provide help across a partnership of other agencies, for example representation delivered for clients of a particular group of other agencies to help ease pressure and enable quality support to be provided.

### **Scale of projects**

There will be a suggested maximum around £200,000 for 18 month period (although higher awards will be considered, particularly for nation-wide projects)

## **STREAM 2 - HELPING TENANTS OF SOCIAL LANDLORDS**

### **Eligibility**

Stream 2 proposals **must** be led by social landlords who are regulated by the Scottish Housing Regulator, either as the organisation delivering the project, or as the lead organisation in partnership with an advice provider.

The proposal can focus on enhancing existing staffing of a social landlord which will be delivering advice for tenants or partnership projects involving multiple social landlords, or between advice providers and social landlords where the advice provider may be the direct delivery agent of some or all of the help to tenants.

### **Priority outcomes against which funding will be allocated**

The overarching aim of Stream 2 is to improve direct and targeted access to advice and casework support for tenants of social landlords who are affected by welfare reform.

This should go beyond general referral arrangement to sources of advice and be a targeted and dedicated resource designed to help tenants dealing with the impacts of welfare reform (e.g. managing the move to direct payments and developing wider financial capability), manage problems effectively (e.g. debt) and resolve them, and ultimately to sustain tenancies.

The differences we want projects under Stream 2 to make are:

- Tenants in social rented accommodation are connected to advice and help at the appropriate time (including pre-tenancy stage), to build capacity and resilience in advance of any problems or as soon as a benefit, debt or housing problem becomes evident
- Tenants are assisted to deal with complex debt and financial problems, with a view to sustaining tenancies
- Where retaining current accommodation is not an option, tenants and occupiers are assisted to identify other options and avoid homelessness
- Social landlords are better connected to independent advice providers and expertise is shared to help achieve longer-term improvements for tenants and occupiers beyond the project period

Under Stream 2, we expect to fund projects that in general focus on providing up to Type II assistance (advice and information), however applications will be accepted which also include a focus on representation should this be identified as a priority for inclusion in the project proposal.

## Priority project types

Under Stream 2, we expect to fund projects that in the main provide Type I and II assistance but we will also consider projects providing type III representation.

The priority services for funding are:

- Projects which focus on tackling priority unmet advice needs for tenants of the landlords involved in the project over the project period. This may include:
  - helping more people get advice by adding capacity/reach for existing provision
  - helping people with a broader range of issues/in different way - for example by focusing on a specific aspect of welfare reform in a targeted way and thus helping to free up capacity within existing advice provision or within the social landlord, or
  - helping people who are currently not accessing advice at all - for example by focusing on a group of tenants who have not been accessing help that is already available or who are likely to be disproportionately affected
- Projects that include advice and casework on debt, benefits, housing and associated problems
- Projects that involve partnerships between social landlords and advice providers, or between groups of landlords to directly deliver independent advice
- Projects that include transfer of expertise between project staff and housing staff, or development of toolkits/resources to create a legacy beyond the project period

## Priority coverage

We are looking to fund projects that have efficiency of scale, and this may mean that priority is given to projects that connect tenants to help across more than one social landlord, including partnership projects between local authority, RSL and advice providers.

Our aim is to fund projects that will lead to as broad a geographic coverage of these areas of assistance as possible, taking into account other advice provision which is already funded for tenants and scale of need. This should include account being taken of the Board's current grant funding programme which is already focussed on assisting people facing housing debt.

Under Stream 2 the assistance within the project's remit will be available and accessible to all affected tenants of the specific social landlords identified in the proposal.

## Scale of projects

There will be a suggested maximum around £150,000 for 18 month period. We will consider higher awards in some cases, e.g. for projects with national or broad geographic coverage

## STREAM 3 - THEMATIC STREAM

### Eligibility

Applications are sought from national, or local not for profit organisations. Partnership applications are welcome and encouraged. Solicitors, local authorities and generalist advice agencies can apply as part of a partnership bid with organisations experienced in working with the specific groups identified as facing barriers to accessing advice and resolving problems.

Priority will be given to projects which focus on meeting the unmet debt and social welfare advice needs of one of the following priority groups

- people with physical disabilities,
- people with mental health problems
- people experiencing domestic abuse

If a project does not focus on meeting the needs of one of the priority groups but the proposal describes and evidences the specific advice needs of another client group we will accept the application and will assess it. We may consider funding for this either exceptionally in this round or in any future rounds should further funding become available.

If we are unable to prioritise the project for funding in this round we will seek your permission to hold it on file in the event that further funding becomes available.

### **Priority outcomes against which funding will be allocated**

The differences we want thematic projects to make are:

- At an operational level, people will have access to assistance that is designed to achieve resolution of problems and achieve sustainable solutions in ways best suited to their particular needs and to overcome barriers related to the particular priority group
- New and innovative ways of delivering help to particular groups will be tested, with a particular focus on
  - preventative help
  - improving capability (individual or organisational), and
  - achieving sustainable solutions
- Organisations working with particular priority groups will gain in competence and knowledge which will last beyond the project period and improve outcomes for the client group in the future

### **Priority project types**

Priority will be given to projects which at a strategic level have the potential to help inform policy and practice at the national level on how to improve outcomes for people facing money, debt and benefit problems.

### **Scale of projects**

There will be an upper amount of £150,000 available per project for grants under this Stream, and applications will be ranked against the priority criteria. There will be no requirement to achieve national reach from this Stream. Small grant applications with a minimum of £20,000 will be welcome.