

The systems thinking approach to reviewing advice services- a report to Scrutiny Chairs' Panel

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April 2019**

Summary

This report provides further details and context around the advice grant funding decisions that were taken by Cabinet in March 2019. These decisions are the result of an open competitive grants process based on a model for advice that was co-designed with the sector. The budget for advice has been protected from cuts; so any changes to funding levels of individual organisations are not linked to having to achieve savings. Funding for advice in 2019/20, and specifically for legal advice, remains at the same level as in previous years. However, through the open competitive grants process, some organisations, including the Hackney Community Law Centre are receiving a smaller share of the budget than previously, and there are other providers, already firmly based in Hackney, who will also now be funded to deliver legal advice.

The model for advice was informed by a systems thinking review which was initiated in 2016, when decisions about advice funding for 2016-19 were taken. The systems thinking approach was chosen because it was a method that would help us really understand what was going on in advice, from the clients' and from a frontline perspective. It was also a method which would fully engage the advice sector rather than imposing a top down service review. Advice providers were active participants in this review, and were encouraged to learn and implement what they learnt on an ongoing basis, as well as working with us to then inform the new model for advice. The Council was also an active participant, seeking to learn from the process about the way we fund and commission and about the ways that our systems create demand on the advice sector which could be preventable.

This report sets out:

- The background context for the systems thinking approach
- The rationale for adopting a systems thinking method
- The first phase of work and the learning from this
- The second phase of work and how the learning informed the co-production of the new advice model
- The Advice Model from 2019 and the assessment process
- Next steps

1. Background

Advice funding before 2014

Before 2014, Hackney's Advice Provision had, for some years, been funded in two ways. The Hackney Community Law Centre and East End CAB received specialist grants, outside of the competitive grants process and other providers received funding through the open competitive grants programme. In 2012, for example, funding for advice totalled £470,000, comprising £350,000 awarded through

specialist grants and £120,000 to other providers over and above this. The number of organisations awarded grants through the open competitive process and the total funding for advice therefore varied from year to year. This meant that there was no guaranteed level of provision nor were we providing a specific policy framework or focus that set out what we wanted from a service, the specific needs and how we expected people to work together.

Ring fencing of advice and review of advice needs

2014/15 marked a step change from this approach. £770,000 of funding was ringfenced for social welfare advice and all advice providers were asked to compete through an open competitive process. This was in part driven by the need to ensure that advice and support was available to residents to support them through a changing external landscape, which included government cuts and changes to legal aid and benefit changes brought about by welfare reform.

In 2015, with the new arrangements bedding in, a review of advice needs was carried out, to provide more of a policy understanding of what was driving need and how these needs were met. The review found that there was a significant amount of demand driven by errors in the wider system (e.g. benefits claims), that much of advice was “crisis management” because people presented so late, that there was a shortage of advice underpinned by the expertise to deal with specific issues e.g. debt and immigration and that there was limited insight into the quality of what was being offered. We spoke to advice providers and stakeholders who worked closely with advice providers, and we built a very sound understanding of advice needs, which remains very useful and valuable today. However, we did not look at what was delivered, the systems behind that or the thinking that informed it.

As a result of this review, the Council put in more dedicated officer support, to ensure that we had a strategic overview of provision and could develop ongoing working relationships with providers to understand demand and respond to emerging trends.

2016-19 funding arrangements

The review also informed the new funding specification for 2016 onwards. This identified features which are still reflected in the advice model for 2019. We wanted to fund advice that was person centred and started with the issues that were most important and pressing for people, focusing on resolving problems, building the capabilities of individuals to resolve problems, addressing system failures and responding proactively to external trends. We said we would measure progress based on whether issues were resolved rather than individual transactional measures e.g. appointments.

However when we came to award grants for 2016/17 the assessment panel concluded, that we (the Council and providers) did not have a sufficient level of collective understanding of how things were working out for people needing and using advice services, many of whom would be vulnerable, disempowered and had little voice or influence over any of the systems that are impacting on their lives. Advice providers were telling us that people needed a more involved type of help and support and there was a need for greater collaboration and join up. But we did not see this fully reflected in proposed approaches to delivering advice. We could see that the external

context would continue to be unforgiving for vulnerable people, following years of austerity, changes to benefits and housing policy, combined with hikes in housing costs, low wages, increased job insecurity as well as the increasingly more hostile environment for immigrants and new regimes in the public sector, which were leading to errors. From this, we were convinced that, as grant funders of advice, we couldn't just stand still and monitor the grants we had just awarded. In fact we were worried that this would create a "compliance culture" in which providers focused on standards and targets, without us all stepping back and understanding what we could do differently.

So in January 2016, our Cabinet report on advice funding said that we would ask all advice providers funded by the Council to participate in a systems review to explore demand and to understand the best ways to work with clients to resolve issues. This was intended to build on and explore further, the broader review carried out in 2015 by looking at what was actually being delivered and the wider systems around this that impact on advice services, rather than relying on performance data or meetings with providers.

2. Adopting the systems thinking methodology

Before commissioning the review, we spent some time developing the approach with advice providers, explaining why we needed to do this, sharing proposals, asking for feedback and discussing the rationale. This was on the agenda for our initial funding agreement meetings in February 2016. We then shared a paper for discussion and comment. The paper talked about:

Undertaking demand analysis (assessing how and why customers access a service) using qualitative methods, focusing on frontline delivery. Identify what is 'value demand' and how much is preventable or 'failure demand'. May include

- Observation in reception and triage
- Sitting in on interviews
- Understanding the processes/pathways which lead to the visit, including pathways/hand offs from other organisations

All underpinned by seeking an understanding of what is important to the customer and to what extent this is met through the service

Establish to what extent services are meeting demand and where demand (particularly preventable demand) is being created.

Undertake process review(s), to be scoped, based on results of demand analysis.

Assess how processes, procedures and service design contributes to, or fails to reduce preventable demand

Adjustments to process design / other areas of provision on a trial 'test and learn' basis

This paper was informed by systems thinking work, including work in the advice sector, the whole systems work that had informed the Munro Review and the findings of the Future of Public Services Commission which advocated for a design approach and a rethink about how we meet rising demand. This helped us focus on some key aspects that we would want the review to understand and unpack:

- The needs and experience of the person needing advice
- The frontline worker perspective

- The institutional / management thinking that was shaping the system everyone was working in
- The wider systems and complex forces forces around advice
- How demand was viewed and managed

This paper informed a brief for external advisory support. We were clear that we needed a methodology that prioritised a high level of first hand experience of advice and frontline insight, and examples were provided of other reviews that had taken a systems thinking approach. We set out key lines of enquiry (see appendix 1), and invited respondents to set out the method and approach they would take. We interviewed three providers and selected the charity Advice UK. Our contract was subsequently topped up with additional investment through funder [Lankelly Chase Foundation](#).

Advice UK were chosen because the “field work” that they proposed in response to the key lines of enquiry was very detailed and prioritised activities which would help us understand clients’ lived experience and journeys through the advice system. They also stressed the importance of funders / commissioners and advice providers being directly involved in the process of review and observation. This was not arms length “consultancy” done to providers - Advice UK were going to upskill and empower Council staff and advice providers to work together to build a shared understanding of what was going on. This was a very compelling way to try to embed and sustain any learning from the process. From the outset, we were clear, and this was explicit in their proposal, that they were taking a systems review approach but that the specification “doesn’t lend itself to a full-fledged Vanguard Method intervention.”

Advice UK began their first phase of work in autumn 2016 with workshops and individual meetings with providers. They talked through the limitations of traditional approaches to service reviews, which did not challenge the “thinking” about a system that is under review, and made the case that without changing our thinking, change can not be sustained. This is illustrated in this Figure 1.

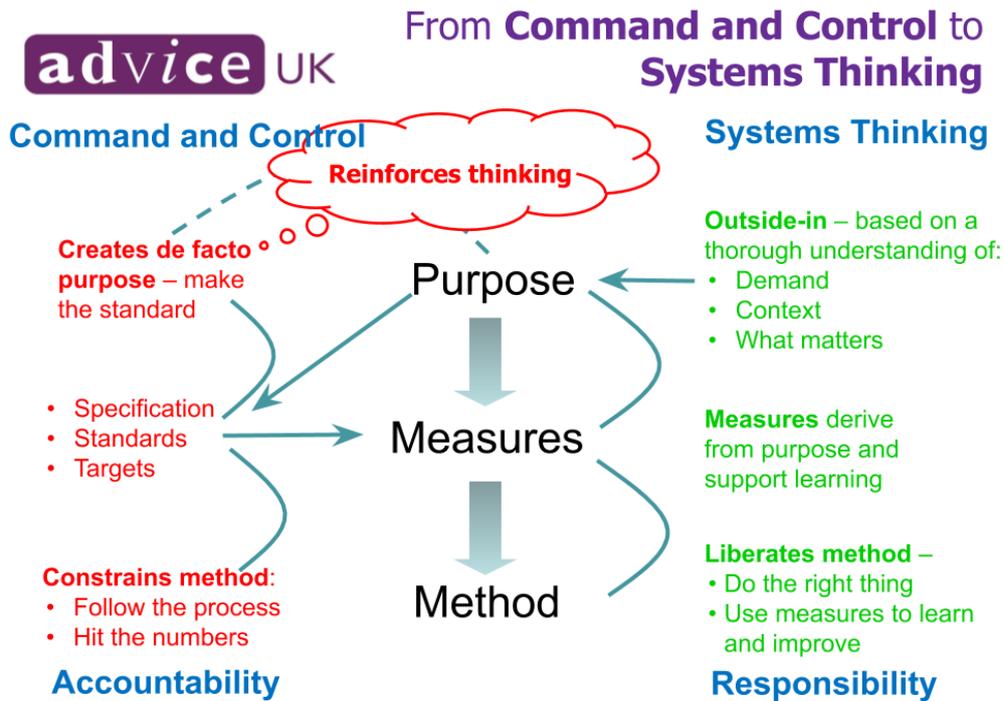


Figure 1 - from Command and Control to Systems Thinking

They also encouraged providers to think about the whole system around advice and identify the wider changes that are needed to develop better advice, as illustrated in figure 2.

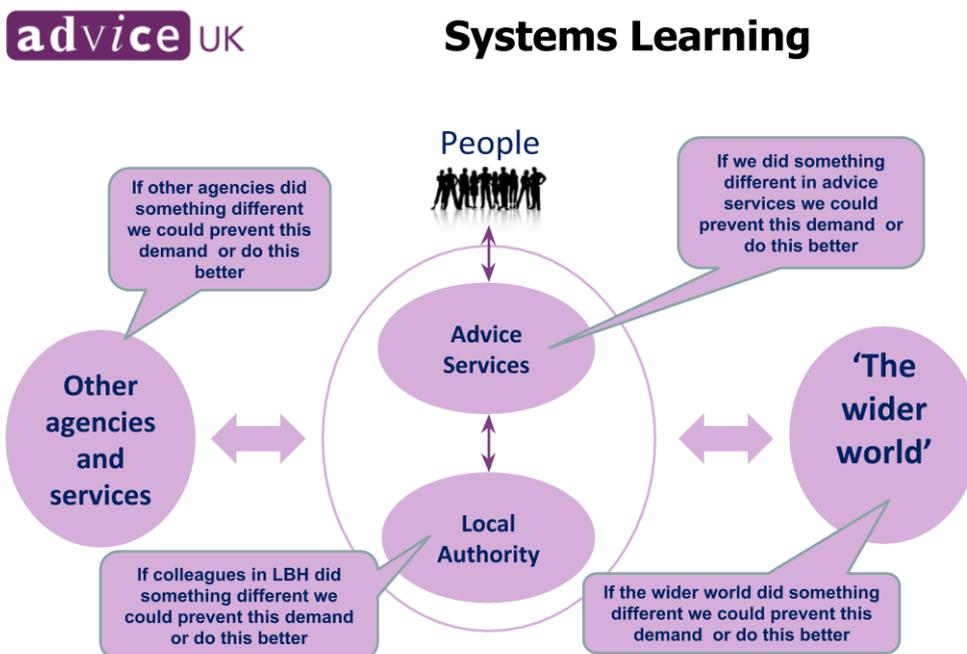


Figure 2: Thinking about the wider system

They asked everyone to be mindful of the following:

- “Unlearning” is difficult as it challenges our thinking
- Leaders must lead the process, but involving people from different roles brings a wider perspective to the learning and helps in implementing change
- The speed and extent of change are in direct proportion to the depth of involvement of leaders across the system
- The consultant role is mentor, coach and facilitator not researcher
- There’s no project plan – it’s an emergent process built on reflective studying and we follow the data and learning
- We’ll take some wrong turns but that’s how we learn what works

Throughout both phases of work, observations and reviewing case histories

3. The first phase of work

Initial meetings with all the advice providers was followed by a period of observing and learning. Over the first few months of 2017, we (Council officers, advice providers and Advice UK) talked to people in waiting rooms, observed sessions and reviewed hundreds of case files to understand what matters to people accessing advice and our capability to respond. Clients could choose whether they were observed or not, guidance about confidentiality was provided along with a guide on observation.

This work helped us to think about the purpose of advice from the perspective of the people who were seeking help and as a result of the analysis of data and the learning gained through observation.

In June 2017, a very well attended session was held at the CAB, co-facilitated by advice providers, to consider the findings to date. We looked at the journey that people seeking advice were on, which was inevitably messy and complex, but sometimes made more so, by the way they were engaged or the way services were managed or funded (see figure 3).

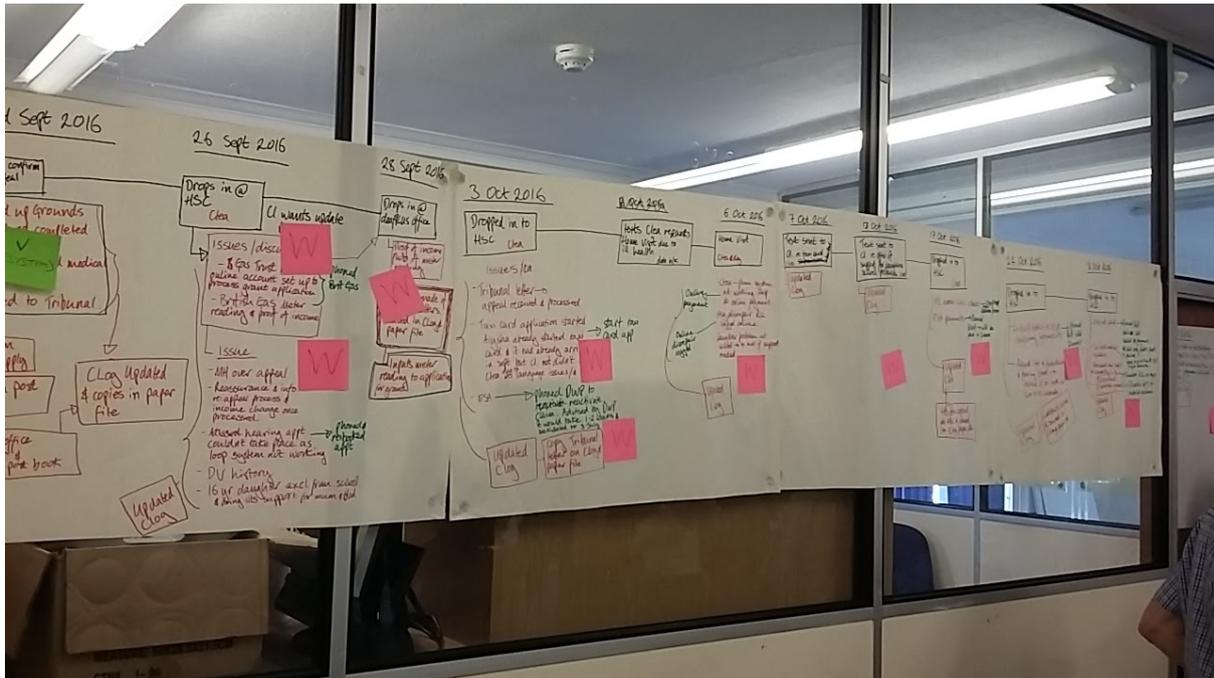


Figure 3: an illustration of the customer journey through advice

In the session we discussed opportunities to change the way we helped people: focusing on what “matters” for them, not trying to categorise people into predetermined boxes, so not hearing what they want or need. We also talked about making the experience smoother for people, avoiding passing people to different services, putting more expertise on the frontline so that people got the help they needed straight away, putting in place the right measures of success to enable us to question, challenge and learn and bringing leaders closer to frontline activity. We also heard about two working trials (“experiments”) that put in place different ways of working in response to what providers had learnt. We shared a set of new measures which could help us better understand what is going on in advice and also shared a working set of design principles (figure 4).

- **Citizens set their own priorities**
 - We work alongside people to find out what matters to them, and learn how to deliver exactly and only that
- **Only do the value work**
 - We work to understand the causes of failure and waste in our own service and the wider system, and to switch them off
- **Work flows through the system**
 - We seek to understand how the work works, what gets in the way and how to stop it
- **Single-piece flow**
 - We work to remove all hand-offs and pull expertise when required
- **Pull not push**
 - By understanding what matters to people, we design to meet demand and focus on delivering what matters, rather than what our own or funders' thinking dictates
- **Best resource on the frontline**
 - We learn what expertise we need to respond most effectively to predictable demand, and how to quickly connect service users with the person / people who will help them solve their problem
- **Change is based on knowledge**
 - We work to thoroughly understand our system outside-in, using data gained in the work to question, challenge and learn
- **The role of leaders is to act on the system**
 - We work alongside frontline staff to support them to improve the work – **in the work** – and act to remove the system conditions that hinder improvement

Figure 4: emerging design principles shared in June 2017

For the rest of the year, we encouraged funded advice providers to experiment based on what we had learnt and to test the new purpose for advice. The experiments had to be rooted in addressing what we had learnt through studying, understanding the problems described above that we were trying to solve, using measures to maximise our learning and thinking about how to build on our findings.

4. Summarising our findings from the first phase of work

In January 2018, we shared an update within a [Cabinet Report on Grants](#). A more detailed update was then shared with our top tier of directors and the Mayor and Cabinet and was [publicly](#) shared with the Integrated Commissioning Board who were keen that our work informed thinking and planning about health and wellbeing. These detailed findings had been shared with advice providers during the second half of 2017. This is a summary of what was in those reports.

Findings about experience of the advice system

Mapping people's journeys through the system shows that people don't always know how to access services and when they do triage and signposting lead to repeat visits. Subsequently the service they receive is often fragmented and unable to support them to learn about and navigate systems for themselves. Advice is sometimes transactional, looking at the presenting problem only. However people experiencing social welfare law problems rarely face a single problem, particularly those experiencing severe and multiple disadvantage who, by definition, face a complex mix of issues impacting, amongst other things, on their housing; benefit entitlements and claims history; their physical and mental health and wellbeing; their capability to interact with impersonal service provision and remote decision-making; and discrimination in various forms. The mapping showed that it could take a long time to reach resolution, spanning many months and that the journey could be messy. This reflected the complexity of people's needs, and the ways that problems could compound and escalate. However in reviewing the journeys, it was clear that there

was a great deal of waste, with time being spent responding to systems failure and preventable demand.

There is also a perceived distinction between what is characterised as “generalist” and “specialist” advice. We found that these functional specialisms are meaningless in the context of people’s lives and create perverse service designs. So the potential for arriving at the “wrong” front-door and not being able to access the help required is significant, whilst at the same time amplifying the perceived demand on services as individuals have to re-present to see different specialists.

Demand

As stated above a key feature of this method is to listen and record what people are asking for in their own terms when they approach a service. The reason for doing this is that if demand is categorised and analysed to fit into existing “boxes” it can create a “distortion.” The effect of this distortion is twofold: firstly it impacts on behaviour on the frontline, meaning that frontline workers can be seeking to categorise people into pre-determined ‘boxes’ and so do not effectively hear what they actually want and need; secondly, it leads to standardised service responses that fail to take into account what really matters to people.

Analysis of verbatim demand of what people asked services to do for them showed that welfare benefits and destitution / financial hardship are the two biggest drivers for people seeking advice. Debt is also one of the key factors with people presenting with problems such as issues with rent arrears, utilities bills and bailiffs. Consideration of welfare reforms and the roll out of Universal Credit is therefore central to the redesign of current advice services as well as the design of a future funding model.

The review has found that the capacity of advice services is constrained by failures within a range of public services and the impact these cause both in driving excessive levels of demand into advice services, and in making it difficult for the advice services to themselves establish communication and resolve these problems. 66% of the preventable demand above was created by external agencies.

Purpose

An important element of the initial phase was to encourage participants to think clearly about the purpose of their service from the perspective of the people who seek help from it. Based on what we have learnt through observations, demand information and what matters to residents, a new working definition of a purpose for advice services has been agreed:

“Help people solve their problems by promptly giving the right advice, support and knowledge”

We have also started to look at the way the grants are managed, prompting a more relational approach to contract management. The way we measure the grants needed to change to look at access, demand and capability. These new measures would enable us to understand how well the service is achieving its purpose in supporting people to manage and avoid future crisis rather than just to benchmark or measure performance.

Feedback from experiments – findings so far (as of autumn 2017)

Citizens Advice

The experiment at Citizens Advice looked at the gateway model they use. The purpose of the Gateway is primarily assessment of whether the service can help and, if so, the correct point in the service to refer to. As part of the experiment an initial conversation was held with people presenting to understand their demand/need in the context what matters to them and what would make their life better. This helped to identify and initiate the work that was of value that would help them move towards this, rather than just dealing with the presenting issue. This also enabled the adviser to work in a relational rather than a transactional way.

An experienced advisor was also available during Gateway hours to offer a fuller service. In addition for four of the experiment days, a solicitor or experienced advisor from the law centre was also on site to offer advice should the need arise. Outside of the experiment if legal expertise is needed people are 'handed off' through a referral system.

We found that people waited on average just under 22 minutes to be seen, as opposed to the normal average wait for Gateway of 3 hours and 7 minutes, and in only 19% of cases were people signposted out of the service compared to 39% in a gateway session. The learning also suggested that fewer follow-up appointments might be needed if more capacity is available on the front line.

Law Centre Staff

Law centre staff co-located at Citizens Advice and staff fed back that this has worked very well from the client's perspective where issues are addressed as fully as possible without having to refer to other services or through numerous appointments.

Learning from the initial experiments

We identified a number of findings to continue to explore:

Resolution – the focus on trying to achieve 'resolution' for people at the earliest stage has generated questions about what is meant by "Help people solve their problems" in the context of Hackney's advice services. For advisers involved in the experiment, the majority of whom had not previously been involved in the systems review, resolution related only to addressing the presenting problem, whereas true resolution for the individual relates much more to the underlying issues they face, whether personal, systemic or structural. These questions relate fundamentally to purpose and will be subject to further exploration as experimentation proceeds in the coming months and services move towards redesign.

Frontline skills / experience – there was general agreement that the frontline role, whilst incorporating sufficient advice experience to address immediate issues, should not necessarily be an expert caseworker. There are practical challenges in trying to resolve issues at the first visit, not least the difficulty in contacting public agencies such as DWP, which can use significant amounts of capacity that could be more usefully applied elsewhere. What is crucial in the initial interaction is to begin to build the trusting, purposeful relationship with the individual that will be the foundation of a successful interaction. Citizens Advice is exploring the development of different volunteer roles and the holistic, supportive approach currently practised by the HAS

consortium will also be central to the development of a different, more relational way of working from the first point of contact.

The impact of restricted access – much of current design of advice services (and indeed most public services) is focused on rationing demand: on creating barriers to entry and signposting away to another service whenever possible. Studying demand shows that the inevitable result of this is simply to amplify demand across the system: if people can't access the help they need they re-present at different points in the system, their problems getting progressively worse until they have a major impact on resource that can no longer be ignored. For example, the experiment at Citizens Advice suggested that offering open access would stop creating queues and that individuals' attendance, given the opportunity, would potentially be staggered across the working week, although it would take time to shift people's learned experience of needing to arrive early to access a queue.

This presents challenges to the service given the multiple funding streams that contribute to advice provision and their individual requirements, which make the allocation of staff time less flexible, but there are opportunities to train and deploy volunteers differently in order to free up access, which should both improve the service for residents and free up capacity.

Whole system experiment – to date, experimentation has been limited to exploring access within a tightly constrained system. The next phase of the work should explore the potential for advice services to take a fully co-ordinated, whole system approach to supporting local residents, whereby the initial focus is to build a productive and trusting relationship with an individual, to understand their context, their assets and any obstacles they face, and to co-design the wide-ranging options that would help them move forward towards their view of a good life. The unprecedented level of co-working between advice organisations in this review provides a positive foundation for such a collaborative approach.

The impact of external failure demand – there is no doubt that the capacity of advice services is constrained by the failure of a range of public services and its impact both in driving excessive levels of preventable demand into advice services, and in making it difficult for those advice services to themselves establish communication and resolve problems. In Hackney, further links are being forged with the local authority, with a view to collaborating to address the preventable demand that emanates from council services. With the roll out of Universal Credit, we have developed a plan to identify and mitigate impacts.

5. Towards a new advice model

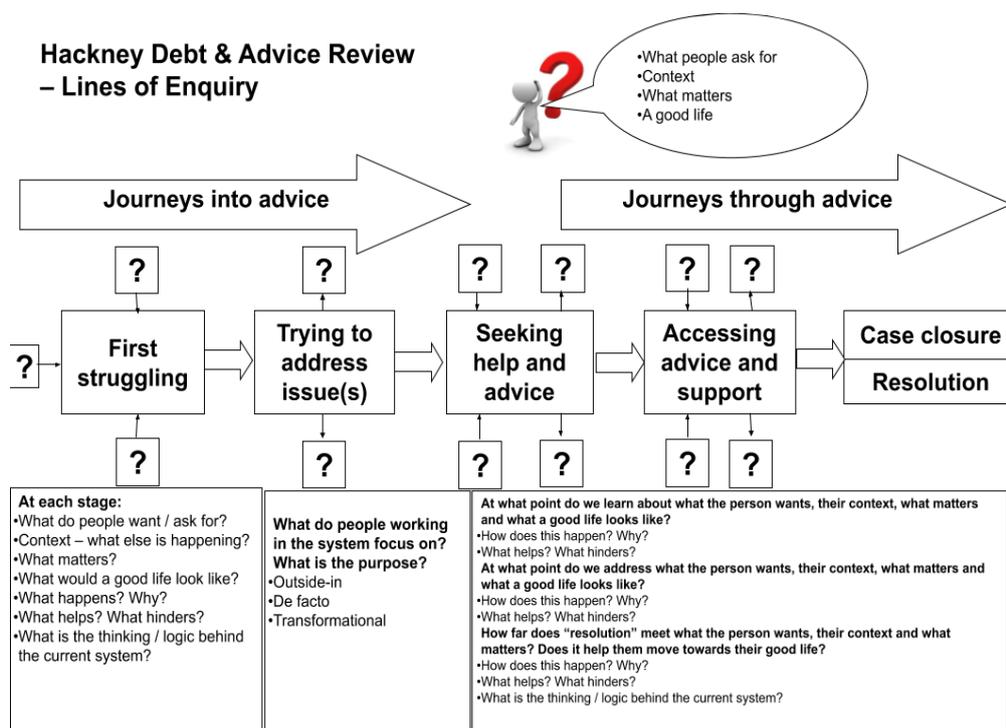
From February 2018, we invited a wider set of providers to get involved, to ensure that the wider system of advice was also reviewed and that there was plenty of opportunity for providers to design the new model as transparently as possible. We also went back out to tender to seek an adviser who could work with us to support the process.

This phase was launched through a workshop and then providers were supported to observe what was going on in their own services and in each others' services over spring and early summer 2018. In June 2018, a review session was held and all the observation data collected was shared, anonymously to inform discussions about

demand. Providers were asked to consider this data in the context of their own systems:

- What have I been learning about my own organisation about how well we currently do what matters and why?
- What helps? What gets in the way?

Providers were then asked to continue to work collaboratively with other providers to map client journeys to better understand what is happening. Each provider was supported with a follow up meeting to help set this up. We convened a meeting in July to go through these journey maps, looking at points in the journey where there had been missed opportunities, where things were passed back to the customer, or passed on to other agencies.



We also held a smaller workshop in July with a number of providers who said they were interested in working with us to develop the purpose. Other providers started to develop the qualitative measures for the final framework. The revised purpose and measures, were then sent to everyone for comment. The reason we put so much emphasis on purpose was to ensure we were responding to what our clients needed, rather than what institutions were set up to deliver. This purpose then underpins the principles for the new service, helps shape what we measure and provides a focus for what we value and what we deliver. In September, in advance of the Cabinet report, we called advice providers together again and held a workshop to introduce the new framework. At the end of this workshop we offered some ways that different providers

could really reflect on how successfully to respond to the new framework, by continuing to apply the systems thinking approach, and offered to work alongside them on this if that would help.

6. New Advice Model

Launch of new advice model

This went to Cabinet in [October 2018](#), having highlighted this upcoming decision in a Cabinet report in [June 2018](#). In October's report, we set out the approach and what we have learnt. We reported that:

The learning from the review has shown those involved that the overarching principle of advice services should be understanding residents' demand in context (not just the presenting issue) and delivering what matters to them. In order to do this an integrated advice system is needed that provides clear, simple and open access, including those residents who face barriers to accessing services, and which minimises hand-offs between advisers and providers. All those involved in advice provision need to take a shared responsibility for system learning and continuous improvement. 4.14 The Council and advice providers will continue to work collaboratively.

We outlined the principles for a new advice grant framework:

Responsive - provision of timely and accurate advice that residents have confidence in. Understanding demand and providing an appropriate level and type of service to meet the variety of need presented. Learning - continuous learning and improvement are integral to how the service operates, with a focus on learning what matters to residents and how to do exactly and only that. High quality - advice and support are provided in a welcoming and respectful environment and the process is as convenient and smooth as possible, enabling residents to quickly access the help, advice and support they need with minimal hand-offs, internally or to other agencies

Professional - employing suitably qualified, recruited and trained staff, who possess both the technical advice and legal knowledge and the interpersonal skills to engage positively with residents to fully understand and meet their needs.

Flexible - a service that can offer and/or draw on a variety of responses to different needs including non-advice support

Enabling - supporting residents where possible to increase their confidence and resilience to be better able to deal with future problems

Collaborative - working with other agencies to share and act on learning about what works in the provision of advice, and seeking to address and reduce the causes of demand for advice.

Accessible - a service that has open access including to residents who face barriers to accessing services.

We launched the [new framework](#) on 8th November 2018, with a clear purpose for advice which was "Help me to solve my problems and regain independence by promptly giving the right advice and support" along with principles which had been shared in the Cabinet report of October 2018. The framework set out a range of

measures that sought to better understand and continuously learn from what was happening in advice, and from whether the service was delivering against its purpose and principles:

Quantitative Measures

Number of people trying to access the service (by type of demand)

Number of people accessing the service (by type of demand)

Number of people who abandon (by type of demand) and reason

Number of people turned away (by type of demand) and reason

Demand Measures

% Value demand

% Preventable demand (external) and source

% Preventable demand (internal) and reasons

Capability Measures

We also wanted to better understand capacity issues, for example understanding the number of repeat visits and reasons, the % signposted or referred elsewhere and reasons, time taken from first contact to meeting the person who can help, and the end-to-end time- first contact to resolution.

Qualitative measures

Qualitative measures will help us to determine how far the service is able to deliver what matters and solve a person's problem.

In this document, we set out clear timescales for the process and dates for interviews, and for when we would advise providers of the outcome. The document stated that we would undertake a vulnerability review for any organisations that were put at risk by the funding decision.

Assessing providers and awarding grants

We asked providers to submit written responses to a range of exploratory questions to test and understand how they would organise provision, in line with the purpose, principles and measures. The assessment process comprised of the following:

Scoring: Applications will be scored against the organisation's understanding of the purpose and principles that underpin the advice framework and their ability to apply them to the new service. This process will consider whether we have the right landscape of services to meet the purpose for advice. Scoring was done by 3 officers from Policy and Partnerships and Public Health against a consistent template.

Reference group: Colleagues from a wider set of services had the opportunity to feed into the process by reviewing a summary of the applications and agree on clarification questions for the interview.

Interviews: These were based on a consistent set of questions based on the application forms as well as specific questions for applicants based on their proposals and approach to purpose. There was a panel made up of officers from Policy and Partnerships, Public Health and one of the systems thinking advisers, along with support from Corporate Programmes.

The application and interview process has provided a pool of organisations that the Council can be confident will continuously improve the advice service in the borough and will provide a comprehensive landscape of advice, as well as those where further development might be needed but where they provide an important role within the existing advice landscape. Rather than allocate grants just according to the merits of each application decisions by officers are beginning to shape advice service to meet need. We wrote to all providers with the outcome of the assessment process on 1st February and said “If you are an organisation currently in receipt of an advice grant from the Council please note that the amount you receive may be reduced as we will be funding more organisations than previously. You may wish therefore to consider the implications of this for your organisation now and take appropriate action.”

Meetings to discuss decisions, based on the breadth and type of provision needed and to share indicative allocations took place from mid February. The Cabinet report published in March 2019 identified the organisations that would be funded and recommended the decision in regards to the final award amounts is delegated to the Director of Strategy, Policy and Economic Development. The recommendations include a transition fund for three organisations where there is a risk to the organisation from the funding decision. The final amounts that are being awarded in 19/20 are shown at appendix 2.

7. Next steps

We are now in quite an intensive process of working with providers to put the new service into practice. Because this is a new approach, that we are committed to getting right, we are going to hold review meetings at providers’ premises every other month, in order to share learning and address emerging issues in the service or wider system, this will include observing in the work to learn together, as the new service will be based on a principle of shared responsibility between the Council and providers.

We will also hold quarterly meetings for the whole advice service. We appreciate that there are a broad range of providers who have been funded and that some providers are receiving a lower level of funding than previously. However the level of grant funding has been maintained and the level of grant funding for legal advice has also been maintained. Neither is this about fragmentation- Hackney is a diverse borough with very diverse needs. By working together and continuing to see advice as a shared responsibility between advice providers and the Council we can provide the seamless service that our residents deserve.

We also recognise that we need to continue to build the capacity and skills of the local sector to work this way and will also be investing in local umbrella organisation Hackney CVS to work with providers to support advice providers to learn from residents’ experiences and their journey through advice. This is our way of reviewing how well the service is working and replaces traditional performance management; the measures of success we have put in place seek to understand who is accessing services and who is not able to, what is driving demand and how their needs are met. We are committed to using these measures, not to make judgements about advice providers, but to ask how well the system is working. The measures are likely to change as we learn more.

We understand that this is a very different way of working and that we are all having to 'unlearn' traditional approaches and methodologies for meeting 'demand' and the way we deliver services that have been adopted and used by public services for many years. It is requiring us all to stand back and challenge our assumptions, expectations and our attitudes towards our roles and each other. However the work undertaken by partners so far has demonstrated how traditional approaches are failing residents and how public services have constrained providers to deliver limited outcomes for residents that can easily be measured and quantified, as opposed to working together as a whole system to ensure that they provide what residents really need.

Appendix 1: Key Lines of Enquiry Table from the 2016 systems review brief

Topic	Line of Enquiry	Suggested Activity
Customer experience	Process mapping: what are the typical customer journeys? To what extent are advice providers delivering 'what matters most' to customers?	<ul style="list-style-type: none"> · Tracking cases · Observation · Interviews with advice providers

Flow	<p>What are the typical experiences/service interfaces of customers prior to, and following, contact with advice agencies? What are the referral processes What are the signposting processes? To what extent does the 'flow' of customers through the service help or hinder (preventable) demand management?</p>	<ul style="list-style-type: none"> · Tracking cases · Observation · Interviews with advice providers
Timeliness	<p>How is triage performed? Are there opportunities to resolve more cases at first contact and/or improve efficiency of the triage process?</p>	<ul style="list-style-type: none"> · Tracking cases · Observation · Interviews with advice providers
Activity	<p>What is the balance between preventative work and casework? What is the balance between individual and group sessions? Are there opportunities to improve the content and balance between activities in response to findings re: outcomes and customer experience?</p>	<ul style="list-style-type: none"> · Service plans and data

<p>Demand</p>	<p>To what extent are services meeting demand How much of demand is 'value demand' and how much is preventable or 'demand failure'?</p> <p>Value demand: complexity of cases or complexity of personal circumstances? Failure Demand: Is demand rising as a result of public service failure or poor design?</p> <p>Avoidable Demand: Is service demand arising from certain behaviours that could be changed?</p> <p>Excess Demand: Are citizens accessing services they don't strictly need?</p> <p>Preventable Demand: To what extent is demand arising from causes which could have been addressed earlier? These could be complex root causes like mental health issues</p> <p>Co-dependent Demand: To what extent is demand unintentionally reinforced by service dependence?</p> <p>Where is demand (particularly preventable demand) being created?</p>	<ul style="list-style-type: none"> · Tracking cases · Observation · Analysis of monitoring data
<p>Reach</p>	<p>Are the advice services reaching Hackney diverse communities? What are the barriers to reaching different community groups? Are there opportunities to improve the reach of the service? Do services understand and address in their provision equalities considerations and the multiple vulnerabilities of clients</p>	<ul style="list-style-type: none"> · Analysis of service user data

Workforce	<p>How are cases split and managed between specialist and generalist advisers? Is there opportunity to reduce hand-offs? Are there opportunities to improve efficiencies in how the workforce is deployed?</p>	<ul style="list-style-type: none"> · Interviews with advice providers · Tracking cases · Observation
Outcomes	<p>To what extent are the customers 'root issues' addressed? Is the service actively managing demand, and reducing preventable demand where possible? To what extent have customers' capabilities and resilience to resolving similar issues in the future been achieved?</p>	<ul style="list-style-type: none"> · Tracking cases · Observation · Interviews with advice providers

Appendix 2 - funding of advice - 2019/20

The new decisions are implemented in May 2019 and so details of the one month extension are shown, followed by the 11 month allocation and then the transition funding.

	<u>Advice Grants - total allocation 19/20</u>	
Advice Grant - 1 month extension	East End CAB - 1 month extension	£30,831
	Hackney Community Law Centre - 1 month extension	£16,916
	Breakthrough (Deaf - Hearing Integration) 1 month extension	£9,376
	Agodus Israel - 1 month extension	£850.00
	City & Hackney Carers Centre - 1 month extension	£1,275
	Derman - 1 month extension	£922
	NLMCC - 1 month extension	£992
	Sub-total - 1 month extension	£61,162.00

Health-1 month extension	SAFH	£10,000.00
subtotal		£71,162.00
Advice Grant - 11 month service	Hackney Chinese community centre	£11,530.00
	CAB partnership	£240,169.00
	Hackney Community Law centre	£105,417.00
	Day-Mer	£10,659.00
	Praxis	£33,666.00
	Breakthrough Deaf-hearing integration	£129,716.00
	Shelter	£46,267.00
	Age UK East London	£60,194.00
	Agudas	£9,350.00
	Fair finance	£28,600.00
	HCVS - development support	£32,083.00
		Sub-total - advice grants
Health-11 Months		
	CAB partnership	£55,000
	Age UK East London	£55,000.00
	Sub-total health	£110,000.00
Transition fund	Hackney Community Law centre	£50,000.00
	Day-mer	£7,876.00

	Hackney Chinese community centre	£7,124.00
	Sub-total - transition fund	£65,000.00
	Advice total spend	£953,813.00
	Advice budget	£770,000.00
	Public health	£120,000.00
	Transition	£65,000.00
	Advice budget 19/20	£955,000.00