

LAMBETH ADVICE SERVICES – GRANT AWARD SPECIFICATIONS:

Grant Category 1 - Telephone advice service - “Lambeth Adviceline”

Grant Category 2 - Basic advice, information, and guidance services

Grant Category 3 - Generalist and specialist advice services

Grant Category 4 - Specialist advice: Legal only

Introduction and context

The current cost of living crisis is at the forefront of key priorities for the Council and, as recovery is not expected to be swift, the potential economic impact and scarring on residents experiencing financial pressures created or exacerbated by the Covid-19 pandemic is likely to be long term. Recognising the importance of access to high quality, appropriate advice, and the importance of early intervention in preventing negative outcomes for residents, Lambeth Council has committed to increased funding for advice services, ensuring that residents are supported to build their financial resilience as effectively as possible.

The Council is offering grant awards for four areas of advice services for two years from 1 Apr 2024 – 31 March 2026, with the option to extend for an additional 1 year to March 2027.

We are seeking providers to deliver a range of high-quality, broad reaching advice services for residents spanning keys areas including:

- Welfare benefits advice
- Debt advice
- Legal advice
- Immigration advice
- Income maximisation
- Housing advice
- Support with claiming Council benefits (e.g. Council Tax Support)
- Form filling
- Consumer
- Relationship and family.
- Other areas relevant to Advice Services

While the Council aims to shift the balance of our advice provision towards prevention and early intervention, we know that unprecedented numbers of residents need help and support to manage existing and often complex issues also. We want to help residents build their skills and confidence around money and personal finance, so they are equipped to manage their personal circumstances effectively, be financially resilient, and able to progress towards a more positive position.

Advice needs continue to change and evolve, with people seeking advice in a range of complex situations. Therefore, we need providers who are responsive, flexible, and who can adapt their services according to resident priorities and requirements.

Lambeth Advice Services – Levels of Advice

Advice Services in Lambeth will be awarded across 4 categories delivering a spectrum of advice across three levels:

- Level 1 Basic Advice, Information and Guidance
- Level 2 Full Assessment
- Level 3 Specialist advice

Further definitions of the levels of advice can be found below.

Level 1 – Basic Advice, Information, Guidance
This involves signposting, form filling or providing basic information on rights, policies and practices, and referral to more specialist agencies for support. Support is provided either face-to-face, telephone or online to the resident in taking action to resolve a typically single issue, with no requirement for ongoing casework or advice. This level of advice can be provided by non-qualified advisors with a basic understanding of how benefits work, or by trained volunteers or advice workers with a good general understanding of, for example, welfare and benefit advice.
Level 2 - Full Assessment
Full assessment of resident issues (typically multiple), providing qualified advice and explaining options to help develop an action plan. This level of advice would typically involve multiple appointments ('casework') and more intensive support e.g. liaising with third parties (e.g. DWP, Council Tax, housing team), income maximisation e.g. welfare benefit or better off calculations for Universal Credit, and advocacy on behalf of residents in arrears. This level of advice should only be delivered by accredited advisors.
Level 3 – Specialist Advice
Organisations undertaking casework at a level were specialist knowledge and appropriate accreditation is required. This would involve intensive one-to-one support carried out by a specialist advisor acting on behalf of clients on issues relating to safeguarding, sanctions, immigration rights (linking into Lambeth's Borough of Sanctuary work), court hearings, appeals, lower and upper tribunals. This level of advice should only be delivered by accredited advisors.

Lambeth Advice Grant Category

Applications for Lambeth Advice grant funding are invited in four categories as detailed below, supporting diversity and accessibility of services for residents from communities across the borough.

The total award for this commissioning is £1,503,300 over an initial two-year period and is broken down as detailed below:

Grant Category	Funding available (2024 – 2026)	Grant Award	Baseline Expectation
Category 1: Telephone Adviceline (Level 1)	£250,000	One award with contract value of £250,000	25,000 residents receiving telephone or online advice.
Category 2: Basic advice, information and guidance (Level 1)	£240,000	Multiple awards of up to £80,000	15,000 residents receiving advice.
Category 3: Generalist and Specialist Advice (Levels 1-3)	£873,300	Awards from £50,000 up to £370,000	22,400 residents accessing advice, with 8,000 residents receiving one to one casework support.
Category 4: Specialist advice: Legal only (Level 3)	£140,000	One award with contract value of £140,000	75 residents receiving specialist legal advice and support.
Total	£1,503,300		

Providers can bid for one, or all of the grant categories identified above.

Category 1 will be one award for one telephone advice service with whole borough coverage.

Category 2 will be multiple awards for basic information, advice and guidance

Category 3 will be multiple awards for generalist and specialist advice.

Category 4 will be one award for specialist provision of legal advice.

Potential providers for categories 1, 3 and 4 will be asked to demonstrate their ability to support residents across the borough through their proposed delivery model. Category 2 will have more flexibility for localised delivery from smaller community-based organisations. Each category has a maximum grant award amount and grant application received above the amount will not be considered.

OVERARCHING PRINCIPLES AND REQUIREMENTS

The key points identified below will apply to all Lambeth Advice Service grant agreements and providers. Category-specific requirements are identified within the specifications for Grant categories 1, 2, 3 and 4.

Strategic Steering Group and Partnerships

To support a cohesive Lambeth Advice Service that is responsive to resident need, and appropriately well linked into key service areas within the Council, Lambeth Council will convene a strategic steering group including, but not limited to:

- Lambeth Advice service providers
- Economic Inclusion
- Adult Social Care
- Lambeth Housing Needs
- Lambeth Housing Repairs
- Children's Services
- Cost of Living Programme

Delivery model

Category 1 Telephone Advice services (Lambeth Adviceline) will be exclusively delivered via telephone/video conferencing and online. Potential providers for categories 2, 3 and 4 will be expected to provide a range of services supporting the comfort and ease of access to advice for residents in Lambeth. This may contain elements of telephone, video conferencing, and remote support (particularly where this might support engagement) but be mainly focussed on face-to-face delivery with a mix of booked appointments and drop-in sessions at identified community locations across the borough. Providers will be asked to outline their delivery model and proposed delivery volumes as part of their Method Statement. For categories 2 and 3 providers will be required to identify specific delivery locations, preferably where advice services either have been or are currently being delivered, or there are clear links to other community engagement activity where advice services would provide added value.

Where necessary, successful providers for all categories will be required to support urgent referrals from Council teams, providing expedited access to support for residents identified as being of high vulnerability and requiring urgent assistance.

Equity, Diversity and Inclusion

Equity, diversity and inclusion are core values for Lambeth and are key drivers for advice service delivery in Lambeth. Providers will be required to demonstrate effective understanding and engagement of key priority groups of residents in the borough for whom we know the impacts of Covid-19, unemployment, and the cost of living crisis are particularly profound. These include (for example) our Black residents and those from Asian and multi-ethnic groups, residents with disabilities and long-term health conditions, young people, lone parents, and residents with language needs and/or low levels of literacy.

Staff and safeguarding

Grant applicants should be advised of a potential TUPE requirement in relation to incumbent advice services, where posts are in-part or wholly funded through Lambeth Council.

All staff (including volunteers) engaged by Lambeth Advice Service providers who may come into regular contact with children or vulnerable adults should have satisfactorily completed a Disclosure Barring Service check as appropriate. Staff and volunteers delivering advice services must also be appropriately qualified, experienced, and supervised to ensure the quality and safety of service provision in line with the level of advice being delivered.

All Lambeth Advice Service providers are required to have adequate safeguarding and health and safety policies in place, and also Employer's Liability Insurance, Public Liability Insurance, Professional Indemnity as per the requirements set out in the Grant Award Agreement.

Grant Key Performance Indicators and Grant Monitoring

Each category has target outputs which set out a benchmark to be considered when applying for Lambeth Council advice service grant funding. Costings and proposed volumes will be considered in this context. Recognising the complex nature of advice delivery however, performance against targets (in particular those relating to the volume of residents engaged), will be considered in the context of the complexity of Advice delivered and will not be considered solely based on volumes of service delivered alone.

Successful grant applicants will be asked to report against new KPI metrics that have been designed to better capture financial outcomes and resident satisfaction with advice services. These KPIs will be piloted for the first six months of delivery and then reviewed. Lambeth Advice providers will be encouraged to engage with the Council on the ongoing development of KPIs and reporting metrics which most effectively demonstrate the reach, value and impact of advice service delivery.

Grant Key Performance Indicators

Quantitative KPIs :

These measures should be reported quarterly via the Council's recommended data recording system:

- Number of residents supported (Level 1-3 provision)
- Number of residents receiving casework support (Levels 2 and 3)
- Number of cases closed (Levels 2 and 3)

Qualitative KPIs :

These measures should be captured as a snapshot at the end of each intervention and reported quarterly. The percentage below presents customer satisfactions targets in any 3-month period:

- Residents feel effectively supported and clearer on next step 85%
- Residents have a greater awareness of wider support available 85%
- Residents have improved ability to manage their situation 80%

- Residents' income is increased and/or debt reduced (where relevant) 80%

Grant applicants will be asked to outline their price, delivery model and proposed delivery volumes against quantitative targets identified above as part of their Method Statement. Providers will be required to complete quarterly electronic Grant Monitoring reporting through the Council's preferred channels with availability for monthly operational meetings in-person, virtual or telephone meetings with the Council. Providers should respond to follow up queries within 3 working days.

Quality assurance and feedback

Advice providers will be required to provide evidence that their workforce is appropriately qualified to deliver the categories of Advice applied for. For categories 1, 3 and 4 advice providers will be expected to maintain an up-to-date quality mark and/or appropriate accreditation, for example:

- Lexcel (Legal practice management standards)
- Financial Conduct Authority (FCA)
- Specialist Quality Mark (SQM)
- Advice Quality Standard (AQS)
- Office of the Immigration Services Commissioner (OISC)

In addition to the qualitative measures identified above, Lambeth Advice providers will be required to participate in capacity building and quality assurance activity through the Lambeth Advice Network (such as Mental Health First Aid) to support the development of a Lambeth advice workforce which is equipped and supported to deliver high quality services that meet local need.

Lambeth Advice providers will be required to pro-actively support and facilitate feedback from residents on service delivery, including bi-annual reviews and action planning in collaboration with the Strategic Steering Group to implement any necessary changes towards the improvement of resident experience and service delivery.

Data reporting and monitoring

Data for all Lambeth Advice Services will be reported centrally through the preferred channels of the Council, ensuring that performance and data analysis across all commissioned contracts can be reported effectively. Where existing data systems are in use, successful providers will be required to work with Lambeth Council to develop data capture and transfer processes which adequately facilitate this centralised reporting and data analysis, in line with GDPR requirements.

Data capture will include identifiers which enable the Council to analyse the numbers and characteristics of residents accessing services, to ensure mutual accountability for funding and to monitor performance and demographics. Providers will also be asked to record the type of advice provided, and qualitative and quantitative outcomes to record financial metrics and resident satisfaction.

Providers will be required to demonstrate appropriate policies and practice (including staff training) to meet GDPR and confidentiality requirements and adhere to the Council's GDPR policies.

Lambeth Advice Network

To support the cohesive delivery of advice services in Lambeth and to build resilience within the sector Lambeth Council will convene and manage a new Lambeth Advice Network. Successful providers will be expected to work in partnership and cross-refer to advice organisations for specialist support, and to fully engage with the Lambeth Advice Network as key players in supporting the capacity, cohesion, and quality of service provision through collaborative working with partners.

Successful providers will act as a conduit for resident referrals into complementary support and services within Lambeth, including emergency support, energy awareness and employment and skills services. Wherever possible, support should include consideration of employment as a sustainable measure to help to address the pressures of the cost of living crisis. This will be facilitated through close partnership working with Lambeth Skills and Employment Team.

Pricing details

The total fixed value of grant awards includes all associated costs and travel. By submitting an application, potential providers are agreeing to deliver the advice service within this fixed price. At the sole discretion of the Council, the fixed price may after the initial first year, be open to further negotiation where there is good reason to do so, and where the budget category held by the Council can fund any additional requirements. Any additional requirements will be considered a Variation to the Grant Agreement.

The Council requires providers to include management and other fees applicable to supply the advice services within their pricing proposal. As set out in Grant Agreement, Lambeth Advice Services will agree to pay all staff engaged or employed in the provision of the services a minimum of London Living Wage.

Grant category 1 - Telephone Advice Service “Lambeth Adviceline”

SERVICE DESCRIPTION

The Lambeth Adviceline Service will provide a centralised point of contact for residents to seek advice by:

- telephone (freephone, or a maximum local call rate)
- online, including remote support via video conferencing
- management of email enquiries
- online portal with resources and tools to enable autonomous access to support and signposting for residents accessing through the web

The Lambeth Adviceline will support residents with Level 1 advice services, providing advice, information, and guidance on a range of issues including (but not limited to) welfare benefits, debt, housing, employment, legal and consumer rights.

Where the issue presenting cannot be resolved through a one-off engagement with Adviceline (Level 1) and signposting, residents will be referred for a full assessment (Level 2) or specialist support (Level 3) through the Lambeth Advice Network as appropriate.

This grant category will be initially awarded as a two-year contract (2024-2026) on the basis below:

Grant category	Budget 24-26	Grant Award	Proposed outputs
Grant category 1: Telephone Adviceline (Level 1)	£250,000	One award of £250,000	25,000 residents receiving advice (tel/remote/online)

Grant category 2 – Basic Advice, Information and Guidance

SERVICE DESCRIPTION

Through Grant category 2 of this grant award process, Lambeth Council is seeking to appoint providers to deliver Level 1 advice in the community. Level 1 advice providers will deliver basic advice, information and guidance on a range of issues including (but not limited to) welfare benefits, debt, housing, employment, legal and consumer rights. Where the issue presenting cannot be resolved through a one-off engagement with Adviceline (Level 1), residents will be referred for a full assessment (Level 2) or specialist support (Level 3) through the Lambeth Advice Network as appropriate.

Grant category 2 in particular offers smaller awards of funding to enable smaller community organisations, or those working hyper-locally or with particular resident groups to access funding to support or expand advice services supporting those outside of the mainstream. Providers may offer non-English advice services, where beneficial.

This grant category will be initially awarded as a two-year contract (2024-2026) on the basis below:

Grant category	Budget 24-26	Grant Award	Proposed outputs
Grant category 2: Basic advice, information and guidance (Level 1)	£240,000	Multiple awards of up to £80,000	15,000 residents receiving advice in proportion to funding awarded.

Category 3 – Generalist and Specialist Support

SERVICE DESCRIPTION

The Council understands that many Lambeth residents require more intensive support to progress towards financial resilience; and also understand from previous commissioning experience that the complexity of cases in Lambeth is increasing in line with demand for services. We are keen to ensure that alongside providing improved access to Level 1 advice in the community, there is a corresponding

increase in capacity for advice from professionally qualified and accredited specialist Advisors where this is required (Levels 2 and 3).

Grant category 3 providers should offer a diverse range of services either directly through Lambeth funding, or where available through complementary programmes that may be funded through other sources. These could include some or all of the below:

- Welfare benefits advice
- Debt advice
- Legal advice
- Immigration advice
- Income maximisation
- Housing advice
- Support with claiming Council benefits (e.g. Council Tax Support)
- Form filling
- Consumer
- Relationship and family.
- Other areas relevant to Advice Services

Generalist and specialist advice should be delivered by professionally qualified and experienced advisors through an accredited advice organisation, holding one or more of the following:

- Lexcel (Legal practice management standards)
- Financial Conduct Authority (FCA)
- Specialist Quality Mark (SQM)
- Advice Quality Standard (AQS)
- Office of the Immigration Services Commissioner (OISC)

This grant category will be initially awarded as a two-year contract (2024-2026) on the basis below:

Grant Category	Budget 24-26	Grant Award	Proposed outputs
Grant Category 3: Generalist and Specialist Advice (Levels 1-3)	£873,300	Multiple awards from £50,000 up to £370,000	22,400 advice contacts, to be divided between contracts in proportion to funding awarded.

Category 4: Specialist Support – Legal advice

Service Description

Legal advice is an identified gap in Lambeth, and as such Lambeth Council is seeking to appoint specialist providers to deliver legal advice in the community. Under Category 4, specialist organisations will deliver legal advice concerning on a range of issues including (but not limited to) welfare benefits, debt, housing, employment, relationship & family, immigration and consumer rights. Providers for Category 4 will support residents referred by other Lambeth Advice Service providers, alongside residents engaged from other sources as appropriate.

Specialist legal advice should be delivered by professionally qualified and experienced advisors through an accredited advice organisation, holding one or more of the following:

- Lexcel (Legal practice management standards)
- Financial Conduct Authority (FCA)
- Office of the Services Commissioner (OISC)

This category will be initially let as a two-year contract (2024-2026) on the basis below:

Grant category	Budget 24-26	Grant Award	Proposed outputs
Category 4: Specialist advice: Legal only (Level 3)	£140,000	One award of up to £140,000	75 residents supported with legal casework.

Grant Application Process

The council is seeking interest from qualified and experienced organisations that can deliver a range of advice services to residents of Lambeth, as outlined above. To apply complete the Methodology Statement for each grant category you are applying.

Deadlines

Applications open on Wednesday, 11th October and close on Wednesday, 22nd November 12:00pm.

To apply complete the Grant application form for each grant category in which you are applying and submit to opportunitylambeth@lambeth.gov.uk with Advice Service Grant Application in the subject line.

There will be a two-week period from 11th October to to 25th October 2023 during which grant applicants can submit questions relating to the proposed grant awards and specifications to the above email address opportunitylambeth@lambeth.gov.uk. Responses to these will be published in a Q & A document made available online to all grant applicants.