

Cardiff, Vale of Glamorgan and Bridgend Community Legal Advice Network

Service Specification

1. Introduction

Cardiff Council, Vale of Glamorgan Council, Bridgend County Borough Council, Welsh Assembly Government and the Legal Services Commission are exploring proposals to tender for a new, jointly commissioned Community Legal Advice Network (CLAN). The aim of a CLAN is to ensure that clients are able to get help with their civil legal problems. Services delivered by the Network should be easily accessible and identifiable. Pivotal to the success of the Network concept is the intention to design services around people's legal and advice needs.

This document sets out proposals for a Community Legal Advice Network to serve Cardiff, the Vale of Glamorgan and Bridgend County Borough. It highlights the services we envisage it will deliver and the performance standards and targets we propose to adopt for these services, based upon the need assessment exercise that has been undertaken.

The draft service specification was published in August 2008, and key stakeholders and service providers were invited to contribute their comments and views on the document. An open meeting was also held on Friday 5 September 2008 to discuss the proposals and receive feedback from those in attendance. The proposals within this service specification have now been redrafted in line with the feedback and comments received.

The needs analysis document is available together with a copy of this specification on the Legal Services Commission website:

http://www.legalservices.gov.uk/aboutus/our_regional_network/wales.asp

2. Network Aims and Objectives

The Network will have the following key aims and objectives:

- To enable individuals to protect their fundamental rights and resolve legal disputes;
- To deliver generalist advice and specialist legal advice services to local communities across the region according to a clear understanding of local needs and ensuring that services continue to meet the needs and priorities identified at all times;
- To provide quality assured integrated legal and advice services ranging from basic information to representation in court, which offer value for money and are supported by co-ordinated funding;
- To be independent of funders and government;
- To take the lead in the procurement area for raising issues of social policy which affect the public, through providing focussed, evidence-based feedback to the commissioners;
- To provide a seamless and joined up service across the procurement area to tackle complex, multiple problems at an early stage to avoid escalation.

With regard to the overarching Community Strategies in the region the Network will:

- Have a responsibility to promote and encourage tolerance, fairness and equality and to influence service providers and employers in the region. All partners will work together to promote tolerance, compassion and respect;
- Act to ensure that it meets the varied individual needs, expectations and aspirations of local people and that everyone has equal access to opportunities, information and services regardless of their race, ethnic origin, language, gender, disability, age, sexuality, marital status, nationality, religious or non-religious belief, family background or any individual characteristic which may limit a person's opportunities in life;
- Work together to promote equal opportunities and to combat all forms of discrimination;
- Tackle disadvantage and promote social inclusion.

3. The Network Structure

The Network will largely replace existing arrangements, funded by the Legal Services Commission, for social welfare law legal advice with local suppliers within the procurement area. It will replace the majority of services currently funded by the local authorities within the procurement area through grants or service level agreements to provide advice in the community.

In order to achieve the aims and objectives outlined above, it is envisaged that the Community Legal Advice Network for Cardiff, Bridgend and the Vale would be provided by a network of suitable advice providers, comprising a lead provider organisation with subcontracting arrangements in place to deliver the full package of services outlined in the specification. There is no expectation that a network should become a single legal entity, but bidders should be aware of the need to provide value for money by maximising the ratio of frontline service to that of management overheads.

During the first year of the contract, the Network's lead provider will receive payment monthly in advance, but during the life of the contract there will be a gradual move towards a position of reconciling payments against claims. Each provider within the Network will be required to meet a set of performance standards, and comply with the terms of the Network contract.

Ultimately, we wish to bring together both the Social Welfare Law (SWL) network and Family advice provision in a more co-ordinated manner: however, this will be achieved through a staged approach.

Stage 1: An open tender will be undertaken for the network services, predominantly SWL, based on the requirements set out in this service specification document. It is envisaged that there will be one contract covering all these services for the whole of the procurement area, however this does not necessarily mean a single provider. If the plans for joint commissioning a Community Legal Advice Network proceed, we expect to launch the tender process for the new service in January 2009 with a view to awarding a contract to provide the service from 1 October 2009.

Stage 2: A separate open tender will be undertaken by the Legal Services Commission (as part of the national tendering programme for all new LSC civil contracts) to award a number (yet to be defined) of contracts for the provision of

specialist family legal advice across the whole of the procurement area. These contracts will be funded by the Legal Services Commission only and will come into effect by 1 April 2010. The family contracts will remain separate from the SWL network element but will stipulate the requirement to ensure referral of clients to the Network.

4. Network Priorities – Categories, Groups and Locations

The Network will provide an accessible generalist advice and specialist legal advice and representation service for clients in the Cardiff, Bridgend and Vale of Glamorgan procurement area.

The core categories of law that will be provided by the network will be: community care, debt, employment, housing, welfare benefits and related public law.

The Network must be open to all citizens within the region, but should ensure that particular efforts are made to target and meet the advice and representation needs of people experiencing barriers to accessing such services. Such barriers include, but are not limited to, those caused by language, culture, physical access, significant levels of deprivation and rural isolation.

In line with the Welsh Language Schemes of the commissioning authorities, and in accordance with the Welsh Language Act 1993, the Network will be expected to provide services through the medium of Welsh, according to the needs and requirements of Welsh speakers living within the procurement area.

The Network will aim to serve all residents of the local population, but particularly those who are socially excluded and who need both protection of the law and help to move forward. As set out in the Needs Analysis, groups of people who are likely to have justiciable problems, and should therefore represent particular priorities for the delivery of services, may include:

- People facing financial difficulties, including the unemployed, people on low incomes and people with unmanageable debts;
- people with, or caring for someone with, health-related issues such as long-term illness, mental health issues or disability;
- young people (including those leaving care);
- older people (over 50 years);
- lone parents;
- asylum seekers, refugees and new arrivals to the region;
- Black and Minority Ethnic communities; with particular reference to the Communities of Interest status in Cardiff, concentrating on the areas of Butetown and Riverside but not exclusively so;
- people with problems relating to accommodation (including people who are homeless or at risk of becoming homeless, and those in temporary accommodation);
- victims of abuse and harassment, including domestic violence;
- geographically isolated people; with particular reference to rural areas within the Vale of Glamorgan and the Bridgend Valleys;
- Offenders, ex-offenders and their families;
- Gypsies and Travellers.

The Network must provide advice through fully accessible, conveniently located advice outlets in a number of locations within the procurement area, where clients can access all of the types of advice in all of the categories provided by the Network. Locations should be accessible on foot from public transport points, be accessible to disabled people, and be centrally located in the following towns/city:

Local Authority:	Cardiff Council	Vale of Glamorgan Council	Bridgend County Borough Council
Principal Outlet:	Cardiff City Centre	Barry Town Centre	Bridgend Town Centre
Subsidiary Outlets:	Ely or Caerau Splott or Tremorfa Llanederyn	Penarth Llantwit Major or Cowbridge	Maesteg Porthcawl

Principal outlets should be open for a combination of drop-in advice and appointments (all levels of advice) between 9am and 5pm, Monday to Friday, as well as either 5pm to 8pm on one evening per week, or 9am to 12pm every Saturday morning (evening / Saturday opening hours to be varied between the three main outlets in order to maximise accessibility).

In addition, initially at least one subsidiary outlet in each of the local authority areas should be delivering an accessible service every day from Monday to Friday, for a minimum of three hours per session. A variety of morning, afternoon and evening sessions should be offered across the procurement area. Services delivered through subsidiary outlets should be flexible. These services should be reviewed and changed in accordance with client need, subject to agreement with the funding board.

The Network must also offer outreach services and other delivery methods in addition to the services provided through the main outlets, to ensure that the vulnerable priority groups listed above are reached. Services should be delivered flexibly, in places, at times and in ways that promote access for clients. Outreach services must be provided to serve the most deprived wards and Lower Super Output Areas identified within the needs analysis (currently those areas included in the Communities First programme). Current Communities First areas are as follows:

Cardiff	Vale of Glamorgan	Bridgend
Ely and Caerau Butetown Splott (including Tremorfa) Ethnic Minority Communities Adamsdown 2, 3, 5 Fairwater 5, 7 Grangetown 4 Llanrumney 6, 7 Plasnewydd 7 Riverside 1, 2, 3 Rumney 5 Trowbridge 3, 4, 8, 10	Gibbonsdown Thompson Street Estate Court 3 Castleland 1	Bettws Blackmill Llangeinor Caerau Brackla 3 Cornelly 4 Morfa 2 Sarn 1

Depending on the needs of the area or group being targeted, outreach services may comprise of generalist advice, specialist advice, information or education and training services. It is the responsibility of the Network provider to work with community groups in order to establish services that meet the needs of the priority groups and areas in question, and to maintain active communication with communities to ensure that the Network is able to respond to changing problems and needs. The Network must have a mechanism to offer specialist advice through outreach according to client need.

The Network will help as many people as possible within the constraints of the resources made available and subject to professional obligations and quality standards. The Network will not charge clients for the provision of services but some clients may be required to make payments for specialist legal advice and representation to the Legal Services Commission in line with the legal aid rules concerning costs, damages and contributions.

5. Funding

Legal Services Commission Funding

The LSC will be contributing £1,142,516 per year including VAT and disbursements. This will fund the specialist advice provision in the five social welfare law categories, plus an allowance for tolerance work and the Housing Possession Court Duty Solicitor Scheme. Indicative figures of the number of acts of advice and assistance that would be expected are included in the performance standards (see below). The LSC intends the money to be spent as follows:

Debt	£332,516
Welfare Benefits	£454,620
Housing	£250,698
Community Care	£27,970
Employment	£50,713
Tolerance	£7,434
Housing Possession Court Duty Solicitor Scheme	£18,565

This money excludes certificated work that will be paid in addition for work undertaken. It also excludes a one off grant of £60,000 that will be paid towards start up costs that will be conditional upon a satisfactory and beneficial business case for the use of the grant, and a £32,164 grant to fund a trainee solicitor training contract. Indicative figures of the number of acts of advice and assistance that would be expected are included in the performance standards.

Council and Welsh Assembly Government Funding

Each Council will contribute funding, to provide generalist advice services (which include diagnostic/triage work, generalist casework, and advice and representation at tribunal). It is currently anticipated that the local authorities will contribute the following amounts per year. The position with VAT is currently being established.

Cardiff	£344,130
Vale of Glamorgan	£140,000
Bridgend	£159,000 (including £35k ring-fenced for a mixture of specialist and generalist housing advice)

The Welsh Assembly Government will also contribute funding, to provide specialist housing advice services for cases, which may but will not be exclusive to those outside the scope of legal aid. This funding must be directed to maximise the prevention of homelessness, as a minimum to fund specialist housing advice at least weekly in Maesteg, Porthcawl and Penarth, in addition to the specialist services delivered through the principal outlets. It is currently anticipated that Welsh Assembly Government will contribute the following amounts per year:

Vale of Glamorgan £28,507
 Bridgend £19,170

Therefore the Network's total annual income, excluding certificated and grant income, is currently estimated at £1,833,323 or £5,499,969 for the life of the three year contract (subject to satisfactory contract performance).

5% of the total funding contributions of the Councils and the Welsh Assembly Government will be allocated to a regional fund, totalling £32,790.35, which will enable the Network to fulfil its responsibilities for social policy work and volunteering. In particular, it is intended that this money be used to fund:

- The recruitment and training of volunteers
- The production of an annual report, as well as ad-hoc reports as appropriate and necessary, to provide evidence-based feedback and analysis to the funding board on issues that are repeatedly causing problems for clients, and to report work being undertaken by the Network to prevent social exclusion and legal problems arising.

3. What services must the Network provide?

The Network must:

Item	Details	Categories of law
1. Provide a generalist advice service throughout the procurement area, including diagnostic work, generalist casework and tribunal advice and representation.	<p>Diagnostic / Triage Service:</p> <ul style="list-style-type: none"> • diagnosis of client's justiciable problem(s); • establishment of eligibility for legal aid where further (specialist) advice is needed; • provision of brief advice where the problem / issue is resolvable within the diagnostic interview (up to 15 minutes); • referral to generalist / specialist advisers within the Network, or to external sources as appropriate; • provision of interpretation where needed by clients. <p>All the actions below would be taken after the initial diagnostic interview, where required, and therefore would be in more depth but falling short of becoming specialist advice:</p> <ul style="list-style-type: none"> • provision of information and advice; • provision of options available to the client; 	All

	<ul style="list-style-type: none"> • identification of further action the client can take; • provision of assistance (e.g. filling in forms, helping the client draft letters, contacting third parties to seek information on the client's behalf and supporting clients to reach early agreement on a dispute through negotiation etc.); • liaising with third parties to identify non-contentious ways of resolving the dispute (including via interagency working) ; • allocation of a (non-specialist) caseworker to take responsibility for managing the client's case and have a continuing relationship with the client for the duration of the case. As defined in the attached appendix, casework may include negotiating on the client's behalf with third parties and taking action to move the case on; • arrangement of further referrals as necessary, following the development of the case / problem since triage; • provision of interpretation where needed by clients. 	
2. Provide a specialist legal advice service	<p>Specialist service to cover all of the five social welfare law categories throughout the region. The service will need to be responsive to clients accessing the service throughout the region whilst providing value for money in its delivery.</p> <p>This will include taking action on behalf of clients in order to move the case on, with the adviser taking responsibility for further action. This may include negotiation and representing the client to third parties on the telephone, by letter, or face-to-face. This could include the use of experts and interpreters, where appropriate.</p>	Community Care, Debt, Employment, Housing, Welfare Benefits, plus Public Law, relating to the above.
3. Provide legal representation in proceedings (as defined by the LSC as Licensed Work)	<p>This includes providing litigation and advocacy services for those individuals who meet the legal aid eligibility test, merits test and their problem falls within the scope of legal aid.</p> <p>(Note: although this is a required part of the Network service, any payments relating to this work will be made outside of the Network's contract payments and therefore this work falls outside of the terms of the contract.)</p>	Community Care, Debt, Employment, Housing, Welfare Benefits, plus any Public Law, which relates to the above categories.
4. Provide a	To provide at Bridgend and Cardiff County	Housing

<p>Housing Possession Court Duty Scheme</p>	<p>Courts an advice and advocacy service to any person (regardless of means) whose home is at immediate risk because of possession proceedings. This includes work relating to rent and mortgage possession proceedings and warrants of possession.</p> <p>This would include providing initial advice, negotiating with landlords and lenders and representation at court.</p> <p>Scheme to be run on the days and times where block listing of housing cases take place in each court. These are currently:</p> <p><u>Cardiff:</u> Tuesday 12pm – 4pm (Mortgage Possessions) Thursday 10.30am – 1pm (Rent Possessions)</p> <p><u>Bridgend:</u> Monday 9.30am – 11am (All Possessions)</p>	
<p>5. Have procedures to deal with emergency cases</p>	<p>Have facilities to deal with all emergency cases urgently, including, amongst others, imminent possession proceeding cases.</p>	<p>All categories where emergencies arise</p>
<p>6. Use alternative means of dispute resolution (where appropriate and available)</p>	<p>Including:</p> <p>Mediation – where a neutral third person, the mediator, works with the parties to help them arrive at a voluntary and mutually satisfactory resolution of the dispute.</p> <p>Arbitration – referring disputes to a neutral third party, often an expert, who will make a binding decision to resolve the dispute.</p> <p>Early neutral evaluation – that is, referring a dispute or issue to a neutral lawyer or expert to provide an opinion which is made available to both sides but is not legally binding upon them.</p> <p>Local and national ombudsman and redress schemes.</p>	<p>This will not be expected under the Network arrangements.</p> <p>The expectation is that the Network would make use of existing services and make onward referrals as appropriate.</p>
<p>7. Have an effective and appropriate referral system to make and receive referrals. This</p>	<p><u>Internal referrals within the Network:</u> It is assumed that Network members will make and receive appropriate referrals of clients within the Network, eg to specialists, following triage or generalist advice, and will check with the member that advice has been given in a timely manner.</p>	

<p>will include a database of locally provided external services.</p>	<p><u>Receiving referrals</u> for clients within the region, for example from telephone advice lines (including Community Legal Advice), from criminal legal advice providers, from family legal advice providers, from non-specialist legal advice providers, and from non-legal advice service providers</p> <p><u>Making referrals:</u> (for example, when at capacity, unable to deliver in the category of law required or where it is appropriate and acceptable for the client in the circumstances of the case) to:</p> <ul style="list-style-type: none"> • Community Legal Advice and Consumer Direct telephone services: It is expected that the client would be directly referred to the telephone service. • alternative face-to-face legal advice providers who hold the CLS Specialist Quality Mark in categories of law not provided by the Network (for example Family, Mental Health, Immigration, Education, Clinical Negligence, Actions against the Police, Consumer and General Contract, Personal Injury and Crime.), including private practice legal advice providers if it is appropriate for the individual to pay for the advice required: It is expected that the appointments will be made for the client and the relevant information passed on to the provider. A follow-up check will also be undertaken to ensure the client received the advice required. • non-legal advice service providers, where the problem is or has aspects of a non-legal nature: it is expected that the client would be given information on the best place to go to resolve their issue (signposting). 	
<p>8. Seek to prevent social exclusion and legal problems arising.</p>	<p>Identify and address issues that are repeatedly causing problems for clients. This may include influencing policies and procedures of particular services or undertaking community legal education for specific client groups or geographical locations.</p> <p>Work should be carried out at a local level, coordinated across the Network and include (where necessary) other organisations in the community. Contributions should also be made to regional/national efforts to highlight and tackle issues of social policy.</p>	

	In order to demonstrate this work, as a minimum the Network will be asked to produce an annual report, as well as ad-hoc reports as appropriate and necessary, to provide evidence-based feedback and analysis to the funding board on issues that are repeatedly causing problems for clients, and to report work being undertaken by the Network to prevent social exclusion and legal problems arising.	
9. Undertake marketing and promotion of services	Marketing and promotion should be undertaken within the target area, particularly targeted to the priority areas and client groups (as set out earlier in this section). All promotional materials should be bilingual in Welsh and English as a minimum.	
10. Respond to local emergencies or newly-emerging areas of need	In the case of local emergency situations, provide a demand-responsive service and feedback to the Councils to enable the management of the situation as required. Keep abreast of developments affecting the public and producing an increasing need for advice – such as the collapse of a local employer, the introduction of a new welfare benefit etc.	
11. Undertake training for volunteers	The Network should be a centre of excellence within the procurement area for the recruitment, training and support of volunteers to assist in the provision of generalist advice services. Volunteers must be recruited from all sections of the community – but a particular priority will be on training and deploying bilingual speakers of Welsh and other community languages, with emphasis on newly-arrived and BME communities.	
12. Income maximisation	Maximise income for clients by such means as undertaking benefit take-up campaigns, benefit checks and similar work, including that arising from debt/money advice.	
13. Take an active role in strategic forums across the procurement area	The Network should take an active role in the strategic forums in each local authority area that deal with issues pertinent to its business. Guidance on the relevant forums in place will be provided by the steering group on the awarding of the contract.	
14. Provide training within	Provide training within the Network to ensure skills are shared appropriately and all advisers'	

the Network.	skills and knowledge are kept up-to-date.	
--------------	---	--

4. Performance standards for the service

The Centre will work to a range of performance standards that set down the levels of work expected in return for the available funding.

Note: the targets included are the minimum expected, and therefore bidders are invited to outline how they can exceed the targets set.

Table of performance standards:

Area	Performance standard
1. Number of clients receiving face to face triage and generalist advice across all three local authority areas in the region.	<p>We anticipate that Council funding could be used to provide a generalist advice service dealing with 30628 cases each year, broken down as follows for each authority area:</p> <p>Cardiff: 17206 cases Vale: 7000 cases Bridgend: 6200 cases</p> <p>Performance standards have been established using a fee of £19 per generalist case. For the purposes of monitoring this aspect, a case is defined as:</p> <p><i>All the work carried out for a client in respect of a single problem, or more than one problem where all the problems are presented at the same time and form part of a single set of circumstances. The client's problem or set of problems may be dealt with at the first appointment, or through any number of subsequent appointments.</i></p>
2. Number of cases of specialist legal advice to be opened as part of the legal aid scheme in the first year of full operation across all three local authority areas in the region.	<p>Funding has been calculated based on the breakdown of cases between categories set out below:</p> <p>1505 Debt 1231 Housing 2159 Welfare Benefits 79 Community Care 50 Tolerance 165 Employment</p> <p>In addition, as part of the Housing Possession Court Duty Scheme:</p>

	200 Possession Cases
3. Number of cases of housing advice, outside of the scope of legal aid to be opened in the first year of full operation. (advice priorities are to focus on the prevention of homelessness).	<p>Funding of cases (a combination of generalist and specialist cases) to be provided in Bridgend County Borough: 364 cases based upon a fixed fee of £96 per case.</p> <p>Funding provided by Welsh Assembly Government for specialist cases to be delivered in Bridgend County Borough: 89 cases based upon use of the Legal Services Commission fixed fee scheme.</p> <p>Funding provided by Welsh Assembly Government for specialist cases to be delivered in the Vale of Glamorgan: 133 cases calculated based upon use of the Legal Services Commission fixed fee scheme.</p>
3. Percentage of clients covered in 1 – 2 above from priority groups (as set out in Section 2)	<p>Overall 80% of clients for general legal advice in at least one priority group.</p> <p>Overall 85% of clients for specialist legal advice in at least one priority group.</p>
4. Successful specialist casework and representation outcomes	40% of specialist and representation cases must provide a substantive benefit to the client.
5. Quality of advice	Where the Commission undertakes a peer review of any member of the Network then a rating of 3 or above must be achieved in each specialist category delivered.
6. Client satisfaction as captured in annual client feedback exercises	80% of all clients rate the service as good or excellent.
7. Complaint resolution	<p>95% of complaints from clients resolved internally.</p> <p>100% of complaints responded to within 5 working days.</p> <p>90% of complaints are fully resolved within 28 working days.</p>
8. Access for general and specialist non-priority/ non-urgent cases	All clients should receive an appointment within 10 working days of requesting an appointment for either general or specialist advice.
9. Access for priority/emergency cases	All clients should receive an appointment

including evictions and other urgent problems	<p>for priority cases (e.g. where a hearing date is set in less than 14 days from when the client contacts the Network) within 4 working days.</p> <p>All clients should receive an appointment for an enquiry related to emergency or urgent proceedings within 1 working day. (NB. This does not remove the need to act immediately in very urgent cases.)</p>
10. Housing Possession Court Duty Scheme hours of operation	95% of HPCDS block listings should be provided.
11. Referrals of clients who require specialist legal advice and whom the Network is unable to help	95% of these clients should be effectively referred (NB. see below for definition).
12. Referrals of clients within the network	100% of clients effectively referred.
13. Training of volunteer advisers	Target for year one = 50 new volunteers to be recruited and trained, using nationally-recognised training courses that cover all areas of generalist advice. 10% of these volunteers to be speakers of other community languages (including sign language and Welsh).

Understanding General Help – Types and Definitions

Definition of General Help

General Help can be regarded as offering and providing the following type of information, help and advice. Whilst General Help tends to cut across a number of categories those delivering this service should be able to differentiate between, and provide a good standard of advice in, specific categories (see General Help with Casework below).

Principles of General Help:

In short, to ensure that individuals, especially the more vulnerable, are made aware of their fundamental rights and that they are given help and guidance on resolving, or taking forward, the problems that they face.

A client should be able to expect the following from a General Help service:

- diagnoses of need; exploration and clarification of the presenting problem and any other problems.
- exploration and explanation of options available
- advice and information relating to the matter the client is facing
- initial assistance (such as drafting basic letters)
- liaison with third parties to identify non-contentious ways of resolving the dispute (including via interagency working)
- identification of, and assistance with, emergency matters and advice on the appropriate action to take
- referral to specialist or alternative services as required
- establishment of eligibility for legal aid where further (specialist) advice is needed

This will generally be done in one interview although clients should be offered further advice and assistance if needed.

Organisations delivering General Help services should have a service strategy/plan outlining how their service is to meet the needs of local communities.

Examples of General Help work:

- filling in forms on behalf of the client
- helping the client draft letters
- supporting client to tackle the problem themselves

General Help with Casework

Some agencies may also provide a casework service, i.e. taking action on behalf of clients in order to move the case on. This may include contacting third parties to seek information on the client's behalf and supporting clients to reach an early agreement on a dispute through negotiation etc.

General Help with Casework is category specific as per the LSC's Quality Mark requirements. There is also a requirement that organisations certified to the Casework level should have at least one person working in the relevant category for at least 12 hours per week.

Definition of Generalist Advice

This means a service that can provide non-category specific information which can be used by clients to either help them resolve matters by themselves, or allow them to locate services that can provide further help and assistance. [The provision of information can often be provided by those who do not form part of the advice market].

Generalist services can provide:

- access to a range of information resources that may enable the client to follow up the matter themselves (i.e. self help information via leaflets, websites, directories etc)
- information on local services that may be able to provide further and more specialist help if needed.
- some assisted information, whereby someone will be on-hand to point clients in the right direction, whether that involves identifying the most appropriate sources of information or providing details of local advice agencies

Triage Services

Triage, also referred to as client assessment (or Gateway Assessment) and diagnosis interviews, refers to a process in which a client is asked questions and is then provided with information to enable them to deal with their own enquiry, or a decision is made to signpost or refer the client on for further advice, this may be internally or externally. The benefit of triage is that those fielding initial client enquiries will have the necessary expertise to identify problems and be able to advise and guide on the best course of action. The advantage of this approach is that it helps to ensure that clients are directed to the right level and type of advice from the outset. In turn, this approach should serve to save time for both clients and advisers.

Clients accessing a triage services are likely to receive the following services:

- An assessment of their problems and told of the most suitable ways of resolving those problems

- Access to basic help and information that will aid the client to follow up the matter themselves
- Some basic assistance (such as assistance with letter writing) with the options available and next steps
- Signposting
- Referrals to generalist and specialist advisers if required (usually in-house services or external local face-to-face services but may also be telephone services)
- Some provision for non-English speaking clients

Access Routes

As noted above these types of low-level advice are commonly delivered through either face to face or telephone services. However, other mediums of delivery can include:

- Self-help information points
- Electronic advice/information (including email, websites etc)
- Written correspondence
- Home visits or outreach sessions

General Help Funding

Funding for general help advice services can come from a range of sources and in various forms, in terms of the type and duration of funding. Whilst the LSC only funds advice at specialist level (i.e. Legal Help and Representation) there remains a significant level of investment into general help services from central government, local government and a range of not for profit and charitable organisations.

Local Authorities invest significant amounts of funding into local advice services at the general help level. Such funding has often been delivered to suppliers in the form of grants. However, more recently funding has been allocated through service level agreements whereby payments are subject to minimum performance standards.