Institute of Money Advisers
Annual Conference & AGM 2017

Built to last: quality and sustainability in money advice

Is there time for 'Social Policy'?

Aka…

'Top tips for the delivery of effective evidence-based social policy work'

from the

Research & Campaigns Team – Coventry Citizens Advice

Is there time for 'Social Policy'?

'we all live lives shaped by rules and regulations. But most people don't know their rights and responsibilities, how to exercise them, or seek redress if something goes wrong. Not knowing can cause incredible hardship. That's why we give advice'.

'if the problems faced by clients / advisers were one-offs, or just about telling clients about their rights and entitlements, that would be fine. But where we find unfairness, injustice, discrimination or disadvantage we find issues repeating themselves and clients returning more than once. That's why we do social policy work'.

Is there time for 'Social Policy'?

The Session (issues to address)

- What is the case for 'social policy' work?

- Where do I start? / Choosing a project

- What sort of project? / Planning the project

- Promoting your work / And finally…

- Next steps.

Is there time for 'Social Policy'?

Why engage in 'social policy' work?

- To ensure clients don't return and issues don't repeat – changing the way things are done saves you time and your clients hardship

- To increase your own understanding of linkages between advice work, decision-making and policy making

- To increase personal expertise (continuous professional development)

- To give you a positive option for your clients when delivering a 'bad news interview'

- To raise the profile of you in your organisation, your organisation in the community and your organisation with potential funders.

Is there time for 'Social Policy'?

Where do I start?

- Start small and build – 'slow and steady' brings results

- Focus on your strengths as an organisation and your expertise as money advisers

- Foster internal buy-in with a narrative on the benefits of SP work for those engaged in it

- Look to work with others, from early on, to maximise your research/campaign returns (sharing expertise and resources)

- Work from a basic project template (see appendix slide).

Is there time for 'Social Policy'?

Understand your data (what do you already know).

- Client data – age, sex, ethnic group, nationality, single / couples, with/ without children, income / housing / disability circumstances etc

- Issue data – is it problems with policy design or delivery, the concepts of affordability or vulnerability, or is it discrimination or exclusion. What is the issue?

- Policy data - what policies / practices are causing the most difficulty (eg welfare benefits, low pay, disability support, debt management instruments, high cost lending, basic bank accounts etc)

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Choosing a project.

- The issue you choose needs to have a 'local resonance' – it needs to be an issue you are encountering

- The issue you choose needs to have a 'local profile' – it needs to be something other agencies and the media are interested in (and can support)

- There needs to be a readily accessible evidence base – you, within reasonable bounds, should already be collecting relevant data

- The project must represent a minimal extra workload on advisers (this will be the 'deal-breaker' for your colleagues)

- There must be a realistic chance of success.

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What sort of project?

- Raising awareness of an emerging issue - eg the impact of specific policies such as the Benefit Cap or the impact of broader policies on specific demographic groups

- Shaping policy design and delivery - eg flaws in council tax recovery policy and procedure, contradictions in the recovery of welfare benefit overpayments under Universal Credit

- Gathering intelligence to support law enforcement - eg identifying and reporting loan shark activity or scams

The choice is yours.

Is there time for 'Social Policy'?

Planning the project.

- Be clear about the what, when, who and where (as well as the why) – if it makes sense on paper then you are half way there

- Identify risks and organise contingencies – just because something is difficult doesn't mean you shouldn't do it.

- Social policy work, like any project work, evolves as new information emerges – don't be afraid to tweak and adjust.

Put practical achievement above 'project perfection'.

Is there time for 'Social Policy'?

Promoting your work.

(internally)

• Your staff / team members / managers want to know what impact their efforts are having if they are to keep supporting you – 'let them in'

• You need to continuously learn how to present and disseminate your progress effectively – colleagues questioning your progress is positive

(externally)

• Be clear who your target is and who your allies could be – work through the latter to reach the former

• All you have is your data and your argument – make them as strong as possible.

Is there time for 'Social Policy'?

And finally…

- Never doubt the value of your work

- Persevere for your client's benefit, for your organisation's benefit and for your own benefit.

There has never been a more important time to use your expertise to make society fairer for the people that need it most.

Is there time for 'Social Policy'?

(what is your next step?)

…If you want to put a social policy project together but are not sure how, or you have a project running but are not clear how to maximise its focus or impact, or if you just want to talk to someone about social policy, get in touch…

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(why don't you set yourself a simple target of delivering something worthy of submitting for next year's IMA 'social policy award'?).

Project Design – template guide

Campaign Title	
Start Date – End Date	
Issue being Addressed What are you looking at and why?	
Overall Aim What impact are you trying to have?	
Operational Objectives How can you translate broad aims into concrete and achievable objectives? (optional)	
Method What – how – when – who?	
Obstacles / Risks What can go wrong (and how can you minimise this risk)?	
How is Success Measured? What are your intended recorded outputs?	
Partnership Working Who can help you with your project?	
Misc Notes Make room for campaign decisions made 'on the hoof' and activities not previously envisaged but which help the cause.	