

Building and maintaining relationships with local advice agencies

It is likely that you have at least one other local advice agency in your vicinity. Other agencies are sometimes seen only as competitors rather than potential advocates or allies. As such, they can be overlooked when it comes to planning stakeholder communications. However, at the very least, being in contact with other local agencies can help you understand each other's strengths in order to help your clients in the best way possible. And it may even lead to formal partnership work, where you enhance the local offering by jointly identifying local needs and developing new services to meet them.

Who

As a starting point you could consider getting in touch with the organisations involved in The Working Together for Advice project (who have produced this guide):

- AdviceUK members;
- Age UK members or local Age Concerns;
- Citizens Advice Bureaux;
- Law Centres; and
- Youth Access members.

All of the above belong to the Advice Services Alliance (ASA). ASA also involves other organisations in addition to those participating in the Working Together for Advice project. You might therefore consider contacting:

- Shelter members; and
- Dial members.

Don't forget that there may be entirely independent advice agencies operating in your area as well.

Why

By coming together, the experts in any given area can do things more efficiently and effectively than they can alone.

This is the idea at the heart of a growing emphasis on partnership work. Particularly with the economic climate as it is, funders are very focused on value for money, often seeing partnership work as a way to achieve it. And the pressure to work in partnership will only increase with the rise in public services being delivered by the voluntary sector. But before advice agencies can work together there needs to first be a dialogue which, nurtured over time, can grow into a trusting relationship.

The benefits of building and maintaining relationships with other advice agencies extend beyond funders' perceptions, though. Having a relationship with other local advice agencies will mean you can refer to one another straightforwardly, so that clients have easier access to the most appropriate services. Such relationships also pave the way for identifying local needs and developing joint services to meet these,

from scratch. In fact sharing information, good practice and knowledge across the sector is one of the most important ways of putting the needs of your service users first.

Opportunities and challenges

Having a relationship with other local advice agencies opens up many opportunities, but equally it does present challenges.

Opportunities

1. Counteract concerns or accusations about duplication in the sector.
2. Alert funders to the efficiencies of joint working in order to perhaps open up future funding opportunities.
3. Share evidence and lobby for policy change with a strong, united voice.
4. Increase your knowledge of, sensitivity to, and ability to reach different client groups.
5. Demonstrate that you are more interested in your clients' interests than your organisational profile.
6. Use it as a catalyst for further partnership work – communicate the fact that you are engaged in joint working and good at it.

Challenges

1. Joint work is more complex and therefore more time consuming than working alone. The rewards are worth the investment, but it does need to be planned for.
2. Any promotion of joint work can cause tension around the prominence of the different organisations involved. A branding policy should therefore always be agreed at the outset.
3. To avoid client confusion, it must be absolutely clear how to access jointly delivered services, and also what the partners stand for in their own right to avoid a loss of identity.

How

The very first thing to do is identify the other advice agencies in your local area and think about how you relate to them. Do you have an existing relationship with them? Do you have different clients and areas of expertise, or is there some degree of overlap in your work? Are you in competition for the same funding? Do you share the same policy aims?

Thinking about these questions will help determine how you make your initial approach. For example, you may need to introduce your work to some agencies for the very first time. With others you may need to highlight shared goals, or focus on funders' requirements.

Perhaps the simplest and most effective way to build and maintain relationships with other advice agencies is to organise an advice forum for your local area. This will provide you with an opportunity to network and share information in a semi-formal way. By having all agencies involved, no-one will feel either excluded or 'picked off', and you will also gain the very best understanding of the local population and its needs. Ideally the forum would meet in person fairly regularly, but conference calls and online

networks can be a useful substitute when this is not possible. The different agencies could take turns to host the forum so that it is a truly shared initiative and no single agency leads or has a position of power over the others involved.

Adding local advice agencies to your distribution list for stakeholder publications – such as your annual accounts, newsletters, stats bulletins and evidence reports – is a useful supplement to local forums, and will ensure that every agency has a rounded picture of the others.

Key messages for local advice agencies

We've come up with a range of key messages that you could use with local advice agencies, providing they are appropriate to your situation. You will need to modify them with your local detail:

- Our primary concern is the needs of our service users. Our agency profile is important to us, but secondary to this.
- We share objectives and can meet them more efficiently by teaming up.
- We can provide better value for money by working together.
- By knowing more about each other's work and having referral processes in place we can improve our clients' 'advice journey'.
- We can learn best practice from each other to improve the strength and resilience of our sector.
- There is a reported public perception that there are too many charities. We can discuss any overlaps to be in a position to explain or remove these.
- Together, we can speak out about policy issues with a stronger voice.
- We have experience of joint work and successfully meeting both partners' needs.

“Meeting regularly with key providers of money advice in Birmingham has helped all of us to have a better understanding of the ways our different organisations operate, and to co-operatively seek solutions with greater levels of trust and confidence in each other. We are working towards developing commonly understood standards for the different levels of money advice that are available through different agencies. We have opened our doors to each other with peer group exchanges, which allow a better understanding of the particular ways of working and pressures faced by other partners, and help to bring to the table discussions around working smarter and closer. This is not a quick fix, but a long term goal of sustainable mixed provision of the highest quality advice for the people of Birmingham.”

Yvonne Davies, Chief Executive, Birmingham Citizens Advice Bureau.



Another workstream under the Working Together for Advice project have developed a range of resources to help local advice agencies work in partnership and are available at www.adviceuk.org.uk/projects-and-resources/projects/wtfa/enhancing/collaborative.

