Strategic Partner Programme
Draft Prospectus
2019/22
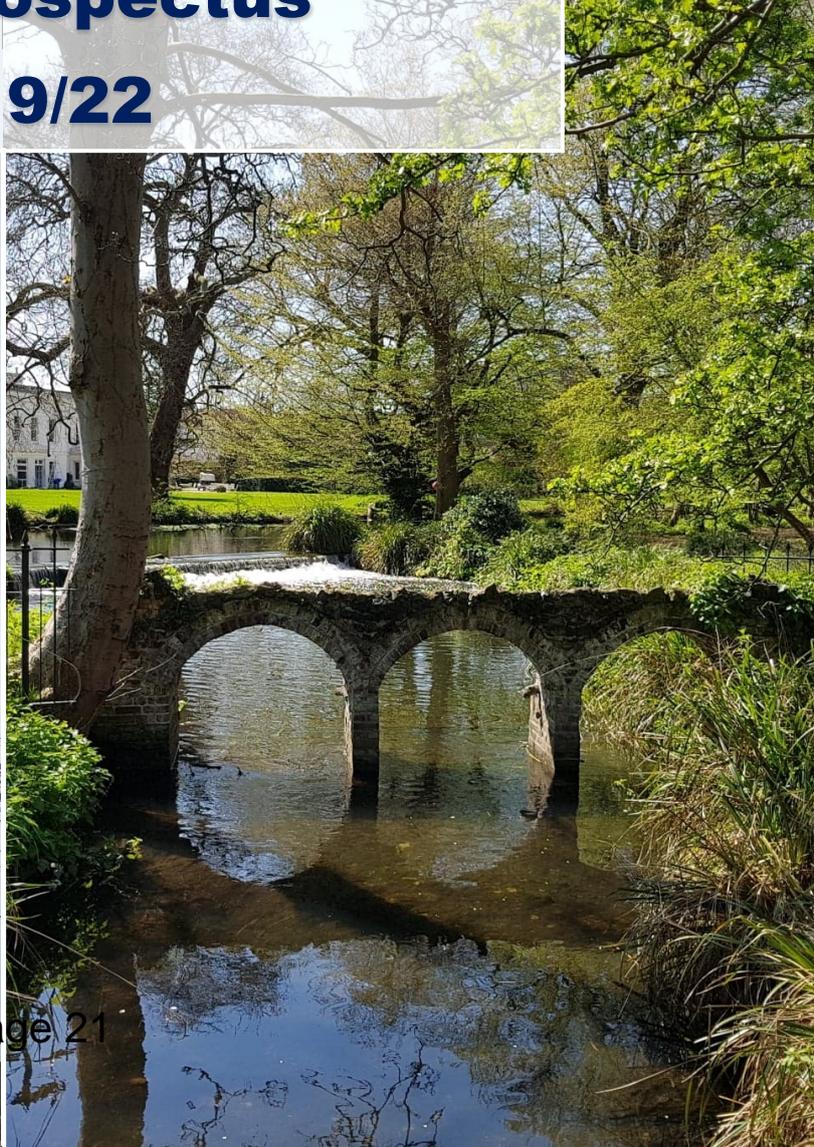
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INTRODUCTION TO THE STRATEGIC PARTNER PROGRAMME

This is a draft version for consultation of the funding prospectus for Merton Council's Strategic Partner Programme 2019/22. In October the Council will be seeking voluntary and community sector organisations to work with us as our strategic partners. We will provide grant funding to these strategic partners with services funded from April 2019.

We are pleased to say that initially, despite councils' overall funding from central government reducing by around 40%, there has been no reduction in funding for the Strategic Partner Programme. The Programme now brings together for the first time a range of funding opportunities to make it clearer to see what is available and easier to apply for funding.

The Programme now comprises five separate elements: information and advice, voluntary sector infrastructure support, wellbeing services, a carers service, and Healthwatch Merton. The draft Prospectus sets the outcomes and strategic delivery models that we are seeking. More detail on each element is set out in the relevant sections of the Prospectus.

It is very likely that the applications for funding we receive will be more than the funding that is available. The Prospectus will form the basis of the criteria we use to decide who will be our strategic partners. We are looking for organisations that have a track record of delivery which they can evidence. We want to work with organisations that can work collaboratively and constructively with us and the other strategic partners. We will look for organisations who have a strong track record in generating resources from a diverse range of sources.

We will also make judgements on the spread geographically and on the basis of needs. The Council's overarching policy priority is to bridge the gap in terms of outcomes between the east and west of the borough and between different communities; the Council also reserves its right of discretion.

We are extremely grateful to the work of the Collaborative Working Group who helped us develop these requirements (see Appendix 2). This group of people, drawn from the Council, voluntary sector, and partners, came together to discuss, research, challenge, and debate all aspects of the new Programme. The timescales were very tight and people gave very generously their time and experience.

The funding panel who will review applications will be scoring applications using a weighting system. This weighting can be found in Appendix 3.

INFORMATION AND ADVICE PROVISION

What service is this funding for?

We are looking to commission a number of organisations in the provision of high quality information and advice. This provision should be a continuum of support across a four tiered model: good quality information, advice, casework, and specialist and/or legal representation where necessary. We would therefore welcome a consortium proposal for information and advice services as we feel that this would offer the best model to meet the features we are seeking.

The outcomes being sought and the aspects of the provision model are set out below. Although provision can be viewed in these categories, a client's journey will often not make the distinction between these levels and may require a number of different levels of assistance throughout their interaction with the voluntary sector. For example, a client may initially approach an organisation asking for information, however the complexity of the case may require more specialist legal representation. A client does not need to seek the first level of advice before being able to access the second and third levels of provision. Support needs to be accessible at the appropriate level to the clients' needs / complexity of the issue.

The four tiers are explained in more detail below:

1. Information
   Fact-based provision of information which may be delivered online, through leaflets, over the phone (or Skype), or in face-to-face interactions.

2. Advice
   This level of provision will cater for those who need a steer on a topic and once supplied with the advice can take the matter forward on their own behalf. This provision will be fast, provide high quality advice, and will enable the client to take further action to address the issue themselves. It could be provided online or might involve answering queries over the telephone or Skype.

3. Casework
   There must be a place in the system for longer-term information, advice, and guidance for people who require continued and/or more in-depth support. This could be as a result of the person's needs and/or the complexity of the issue. The goal is still to enable clients to support themselves however in these cases it may require more comprehensive wrap-around support.

4. Specialist and/or legal representation
   The system must also include capacity for specialist knowledge and legal representation for those cases which require professional intervention or court appearances, such as formally appealing a benefits pay-out.

   *Please see Appendix 1 for definitions

What time period will the funding run for?

2019/20 – 2020/21

What are the key features of this service?

Prevention

The purpose of providing high quality information and advice should be to prevent people, where possible, requiring more intensive services or support. All organisations should have this as a goal

- A number of leading categories have been identified through conversation, various meetings, and surveys as being the largest issues facing the most voluntary sector providers and residents of the borough; these are debt, benefits, and housing. These issues may then have a knock on effect on an individual's mental and physical health.
- Disabled people or those facing challenging life events e.g. through illness or impairment, may well require high quality and timely advice. Advice on what support, care and help is available will be therefore be an important element of advice services.
- With regards to housing, whilst any preventative service will be tenure neutral, priority will be to those individuals/ households in the most acute housing need. The most acute form of housing needs is homelessness or threat of homelessness. The main cause of homelessness in Merton is from private sector tenants and it follows therefore that priority will be given to this group.
- Registered Provider (RP) tenants (Housing Associations) are not excluded but a recognition is made that these tenants benefit from a preventative support framework by their own landlords which private sector tenancies do not. It will be expected that providers will ensure that, where reasonable, RP tenants will have exhausted their own landlord's complaints and preventative services mechanisms in the first instance before embarking upon detailed casework and preventative work.
- It should be recognised that certain clients who are RP tenants may require support from the voluntary sector through the process of the preventative support framework, and so there remains a need for support of RP tenants.
- People will often approach those they know or feel comfortable around for assistance, and so there needs to be consideration for those who might present to their support networks, such as places of worship. These less formal channels of assistance should be supported and enabled to correctly refer people in need who they encounter.
- Often, those who have some of the most challenging needs will be those who are least inclined to approach an advice organisation, and so the provision of information and advice services needs to effectively target these people and provide services which are accessible and welcoming. This may include measures such as offering BSL, foreign language interpreters, Skype advice sessions, or having easy-read information available.

The services provided should be adaptable to change. With Council support, the voluntary sector should be aware of upcoming changes to policy which might change the demand for advice services

- The provision of information and advice needs to be adaptable to any changes to the landscape of advice need and demand and so an organisation should be able to demonstrate how its staff and volunteers are kept up to date with the latest information and training.
- Policy announcements and large-scale shifts can drastically change the demand for advice services. For example, the introduction of Universal Credit has seen a huge upsurge in the number of clients seeking advice on their benefits entitlement.
- Merton Council will do all it can to share intelligence of any upcoming policy changes which might impact on the voluntary sector's advice services. Additionally, the sector should maintain good communication with the Council to draw attention to any concerns or unmet need.
- Smaller or long-term changes can also have implications for advice-needs in the borough, such as a slight increase in interest rates affecting residents' ability to keep up with mortgage payments, resulting in higher demand for relevant advice. There needs to be a proactive approach to identifying trends and reconfiguring services where appropriate.
- The Council and partners should be able to adapt its commissioning role in order to best meet the advice needs of the borough. This flexibility should be designed into the service from the start, as organisations may struggle with being told that the parameters of the commissioned service have changed within a short timeframe.
- Partners should seek opportunities for delivering information and advice as vital services that wrap around related services (e.g. health) and deliver from any new facilities that may be developed over the lifetime of the grants programme, e.g. the Wilson Health and Wellbeing Campus.

Quality

All strategic partners would be expected to deliver quality advice and must receive regular training. Advice should be subjected to any relevant regulation

- There must be a level of quality assurance built into the system to ensure that clients are not only getting timely advice on the appropriate topic, but also that the advice is of a high standard. This will involve regular training of staff, and access to appropriate materials and online tools for caseworkers.
- Those who are providing advice must be well trained in the appropriate field and be aware of shifts in funding and policy in order to best advise clients.
- There needs to be a consistency of advice. Clients should be able to receive the same high quality advice regardless of which organisation they approach.

- Organisations which provide advice should be properly regulated; for example, debt advice is regulated under the Financial Conduct Authority and immigration under the Office of Immigration Services Commissioner or the Solicitors Regulation Authority.
- It is appropriate that those giving advice operate under a recognised quality assurance scheme; the main schemes for this include Advice Quality Standard, Specialist Quality Mark, or Lexcel. Organisations that don't have these quality marks are encouraged to do so as the auditing process gives some assurances of standards and quality.

Navigability

Organisations are expected to ensure their services are clearly advertised and signposted, so that clients are able to determine quickly and easily which organisation is the most relevant to approach

- Clients seeking advice or information need to receive the right advice at the right time from the right people. The organisation which someone initially approaches may not be the most appropriate to deal with their needs, and so effective referrals and handoffs are essential. This might involve a 'warm handoff' where introductions are made to the referral organisation by the referring agency to ensure a smooth transfer between providers.
- There needs to be a holistic 'whole person approach' which considers clients as a whole in order to identify what other (possibly underlying) needs they might have which need to be addressed in order to ensure an improvement in their circumstances.
- The social prescribing pilot which has been taking place demonstrates the benefits to individuals, communities, and statutory organisations of successful community navigation, and the model is applicable to the voluntary sector more widely. Any organisation forming part of Merton's Strategic Partner programme should support and engage fully with Merton's 'All Services Hub', which acts as a directory and information site. Organisations are expected to ensure that their information and contact details are accurately represented.
- It is also crucial to have a sector which is clear to access in the first instance. Consideration should be given to opening times and the location of provision so that access can be improved. There should be a clear offer from organisations offering advice services, and a central landing page which clearly sets out which services are offered by which organisations. This would likely take the shape of an online model, although there will be users who are not online or struggle accessing or interpreting the information, and so consideration must be made for this.

Organisations should consider joint funding bids or the opportunity for forming consortia. The providers should assist one another as and when necessary and build strong relationships

- The voluntary sector is strongest when it works together. With regards to funding, smaller organisations should consider joining with others to put forward more robust bids to any relevant funding authority. There should be a commitment and intention to cooperate with other organisations.
- There are too many individual pockets of knowledge within the sector, and often this knowledge relies on an individual, meaning that turnover of staff can impact the provision of services. Merton's 'All Services Hub' will act as a central resource which organisations and individuals can access, providing information and signposting to relevant organisations.

Accessibility

Ensuring services are accessible to all is a required feature of any funding bid

- Service design needs to be accessible and make reasonable adjustments for anyone who may want to use them. Many advice-giving organisations report an over-representation of disabled people in seeking this kind of support.
- This accessibility might take the form of easy-read documents, wheelchair-accessible facilities, or the provision of Skype sessions as well as regular telephone calls.

Advice forum

An advice forum brings organisations together to discuss issues, problem solve, and share information. Future providers should play an active role and engage in any advice forum which might be started

- Organisations should think about creative ways in which they can work together and support one another, by sharing learning and support. There needs to be more of an advice network in the borough, which effectively communicates shifts which are likely to have implications for the provision of information and advice.
- The Advice Forum will have a number of aims, including networking/sharing across organisations; understanding the needs of Merton (with sharing of data from Council); and the possibility of partnerships/collaborative working through joint funding bids.

An organisation's focus should not be to operate from its own premises, but should be to have some form of outreach, such as home visits, or working in community spaces such as libraries, job centres, or GP surgeries

- The provision of information and advice should be operated with an element of outreach embedded in the model. Organisations which are fixed in a certain premises rely on people approaching them and thus risk overlooking the most vulnerable residents who might require the most support.
- Providing a safe environment which relaxes clients has the additional benefit of identifying other issues. Many clients will approach an organisation over a single issue however further conversation and interaction can reveal multiple issues which should be addressed.
- The outreach model should understand that many people will only go where they feel comfortable, and may not like interacting with people they don't know, and so organisations must work in the community. Dependent on the circumstances this might include GP surgeries, libraries, residential care homes, job centres, the Wilson Health and Wellbeing Campus once developed, etc.
- Outreach work does not remove the need for home visits in certain cases, as outreach work in the community doesn't overcome the barrier of people not being or feeling able to leave their homes.

Enablement

Wherever possible, clients should be enabled to take further action themselves and to improve their own circumstances. Some clients may simply need a steer in the right direction whilst others may require longer term support in order to build their resilience

- The goal of providing information and advice is to see an improvement in a client's circumstances and, if possible, enable them to help themselves. In a majority of cases clients will simply need a steer in the right direction for them to take further action themselves. Where further intervention and casework is required the goal is similar, although there are more steps in achieving it.
- The voluntary sector must support people in building their resilience – the ability to bounce back from tough times and having the capacity to overcome issues.
- Clients should be empowered, giving them the authority or power to do something, supporting their options to make stronger and more confident decisions, and being in control of their life and claiming their rights.

VOLUNTARY SECTOR INFRASTRUCTURE SUPPORT

What service is this funding for?

We are looking to commission a service which provides support to Merton's large and thriving voluntary sector. This service should meet the features set out below, and should act as a hub which supports the voluntary sector through training and advice, but also provides certain services such as a directory and possibly even shared back office services.

The following are some of the categories of support needs identified by the voluntary and community sector in Merton. They were discussed as the elements necessary to sustainably and effectively meet the needs of residents. A thriving voluntary sector is a key priority for local government given the role that the VCS increasingly plays in meeting demand as council services reduce or tighten eligibility criteria. It should be recognised that the funding available from Merton Council will not cover all the activities listed below. The infrastructure service should provider a universal offer to the voluntary sector free-of-charge, while some additional services may be paid for.

Tiers of organisational need

Three tiers of organisational need have been identified:

1. The first tier is a level of support which includes the provision of good quality advice and guidance on certain topics. This level of guidance would be free to all groups

2. The second tier is indicative of long term assistance provided to voluntary sector organisations, including ongoing training packages; reaching accreditation; the provision of services such as a joint HR, finance, or IT support; or specialist training such as on safeguarding. There should be a resource available to 'health check' voluntary sector organisations and assist them in ensuring their governance structure is up to the required standard, including training. This is also the case for the organisations' wider systems, processes, and policies. This longer or more in-depth support might be a charged-for service

3. The third and final tier in this structure of organisational need can be seen as a form of crisis management. This level of required support might involve planned / managed closure of an organisation or could involve recovery through a closely managed process. This tier of support might be free, paid for, or funded by commissioners on a case by case basis

The support needs have been grouped into the following categories:

Governance | Resources | Practical Support | Leadership

What time period will the funding run for?

2019/20 – 2020/21

What are the key features of this service?

Good governance

Good governance needs to be in place for recourse to public funds, along with high quality trustees and board members

- Strong governance of an organisation might require advice, training programmes, and reviews, including board training and mentoring. The support organisation should be able to provide a governance review, where it checks the status of an organisation's arrangements to ensure it is robust enough to form part of a successful funding bid.
- One of the largest barriers to organisations successfully applying for funding is their governance arrangement. Good governance needs to be in place for recourse to public funds and smaller organisations may struggle to effectively demonstrate this. Good quality trustees and board members are essential.
- Strong governance of an organisation might require multiple offers of training and reviews, including board training and mentoring. The support organisation should be able to provide a governance review, where it checks the status of an organisation's arrangements to ensure it is robust enough to form part of a successful funding bid.

Quality assurance

Organisations will need advice and assistance in understanding what is required to receive accreditation

- The two steps in an organisation achieving quality assurance are as follows. Firstly, they need to conduct a form of internal self-assessment to test whether the correct systems are in place and working effectively. Once this is the case, an organisation can seek external accreditation which will improve any application for funding they put forward as this provides an assurance of the quality of their services and processes. Organisations will need advice and assistance in understanding what is required to receive this accreditation and this support. Nationally recognised accreditation also has a large cost implication and so smaller organisations may struggle to achieve this.
- The provider may also provide a mock assessment to test an organisation's eligibility for accreditation.

Crisis management could involve mediation or intervention, or planned closure

- In line with the third tier of support provided to the voluntary sector, crisis management could involve mediation or intervention, and in the worst situations will involve supporting the organisation to close and ensuring that the communities which it provided for are adequately informed, supported, and signposted elsewhere.

Volunteering support

This might include recruitment, induction, ongoing training, development, recognition, and making clear what the expectations of the volunteers are. Volunteers also require support and space for reflective learning – a network of support

- The work carried out by voluntary sector organisations frequently relies on the hard work of dedicated volunteers. Organisations, large or small, will often have far more volunteers than they will paid staff and there are essential management implications that come with this. High quality ongoing management of volunteers is essential in retaining this valuable resource. Organisations may struggle to coordinate large numbers of volunteers and so administrative support could be greatly beneficial in these cases. This might include induction, training, development, and making clear what the expectations of the volunteers are (this will also make clear the distinction between the roles and expectations of volunteers and paid staff).
- It is also essential that volunteers have access to ongoing training; it would make sense for this to largely be provided in a central capacity, at least with regards to transferrable skills and knowledge which will be relevant to a number of organisations, such as safeguarding or dealing with mental health. It may be more relevant that highly specialist training be provided by the organisations themselves. There also needs to be consideration for how 'accredited' training can be provided to those working in the voluntary sector, as this often comes with a large cost implication.
- Volunteers require space for reflective learning. Support for volunteers would likely come from the organisation with which the volunteers are associated, however there is scope to create a support network for volunteers across the borough which could provide a space for idea sharing and reflective learning. The possibility of a 'volunteer passport' could be considered, which credits a volunteer's time and helps them build their CV.
- Recruitment of volunteers can often be a difficult task for organisations, particularly those smaller organisations who may have less name recognition and online presence. There should be a centralised resource for the recruitment of volunteers, which would be readily accessible by both potential volunteers and the organisations looking to hire them. The centralising of this facility should involve robust publicity and could incorporate some kind of reward/recognition scheme or event, which celebrates the hard work done by

the community's volunteers. This might be provided or facilitated by the council and/or the support organisation.

Development of the voluntary sector's enterprise acumen. Additionally, the support organisation should also provide access to a database of funding which is available to the sector

- Funding opportunities need to be clearly available to voluntary organisations, whose funding will often come from a varied range of sources, including different tiers of government, the private sector, and lottery funding. A clear system should be provided for organisations to explore any available funding opportunities.
- The Chamber of Commerce can act as an important link between local businesses and the voluntary sector. Any provision of support to the sector should be sure to work with the Chamber to increase its work on community giving in the borough. This will involve engaging with Merton businesses and developing and implementing policy and strategy.
- The voluntary sector's enterprise acumen needs to be developed and supported to grow the social enterprise market. Organisations need to be supported in risk-taking and encouraging a business-like approach. This is quite a departure from the traditional mind-set of public sector organisations but is becoming ever-more crucial in the current climate of public finances.
- The infrastructure support organisation is expected to be able to advise on matters including crowdfunding, should organisations be interested in funding through this process. Additionally, the support organisation should work with Merton council on considering a preferred provider for Crowdfunding, should the Council decide to take an organisation-wide approach to this.

Funding bid support

Organisations should be supported in making funding bids. Some of the largest areas of support need identified are in being able to demonstrate impacts and the budgeting aspect of bid writing

- Bidding for funding from the local authority, central government, big lottery, etc. is challenging for smaller organisations who may struggle to effectively demonstrate their ability to deliver projects on a larger scale. Therefore, there could be a centralised capacity for advice on bid writing, assisting the voluntary sector in preparing bids for funding and advising on the best techniques for doing so. As well as the writing of bids, other aspects might include budgeting as well as effectively demonstrating impacts.
- Delivering the above will vary between organisations, as some will simply be seeking advice on the bid writing process, with the aim of using this knowledge in future funding bids (this is perhaps a more sustainable model, with organisations being enabled to carry out the work themselves in the future). Others – perhaps those with deeper capacity issues – might want to

'hire' assistance in writing bids, to ensure they are maximising their chances of being awarded funding.

Ability to deliver low cost courses of general interest to the sector e.g. safeguarding, health and safety, volunteer management, quality assurance etc.

- Volunteers and paid staff require access to ongoing training; it would make sense for this to largely be provided in a central capacity, at least with regards to transferrable skills and knowledge which will be relevant to a number of organisations, such as health and safety, safeguarding, or dealing with physical or mental health. There also needs to be consideration for how 'accredited' training can be provided to those working in the voluntary sector, as this often comes with a large cost implication.

Shared services

The sharing of back office functions such as HR, IT, finance, and payroll is of great value to smaller organisations, and if an organisation were able to offer this it would be well received

- Smaller organisations with few staff often lack the capacity to provide effective and high quality back office support functions such as HR, IT, Finance, and Payroll services. The provision of these services could come through a central provider, at a reasonable cost given the economies of scale.
- It should also be considered which services need to be provided in-borough, and where there is logic in providing more regional support. Certain services which require more face-to-face interaction and personal support would logically be provided on a local level whilst larger systems which can be operated remotely may benefit from being located regionally.

Communications support

Providing communications advice and support could involve assisting with branding and social media presence which can aid in attracting and recruiting volunteers

- Branding and social media presence can be important for organisations, particularly in attracting and recruiting volunteers, and raising awareness of the work they do in order to gain funding and support. Communications advice and support could be provided by a support body, even if on an informal basis.

The support organisation could facilitate the creation of partnerships, consortia, and mergers of voluntary sector organisations

- Voluntary sector organisations are passionate about their work, often forming because of a drive to make a difference. However, there needs to be caution for the sector not to replicate its work across multiple organisations, causing inefficiency and dividing much-needed funding between small groups. When a new organisation begins to form it should consider whether it has a different offer to the work currently being done by the sector.
- With regards to existing organisations, they should consider opportunities arising to collaborate and form partnerships, specifically around projects and funding opportunities. Mergers should be proactive and do not only need to occur between similar organisations, but might involve smaller organisations being incorporated into larger services.
- One of the main barriers to funding is the sheer number of applications which funding opportunities receive. Forming a consortium to bid for funding is often encouraged by funders and can make larger funding opportunities more achievable to smaller organisations as it allows them to demonstrate good governance and processes. It also avoids duplication, provides economies of scale, and often has a wider beneficiaries pool.
- Partnerships should be encouraged and coordinated to make it an attractive prospect for any voluntary sector organisation.
- There may be particular sections within the sector that need development support. These needs will arise from time to time and may relate to a particular cohort of people, policy priority or a geographic area. We would be looking to the provider to support this type of development need as identified by the commissioner.

The infrastructure service should support and engage with Merton's 'All Services Hub', whilst also working to unite the borough's voluntary sector and facilitate strong networks

- Capacity to efficiently provide support services at a local level may be lacking and so there should be effective signposting between support services to guide an organisation to the most relevant or available resource for them to utilise.
- Any infrastructure organisation which is funded by Merton Council should engage fully in the 'All Services Hub', ensuring it is fit for purpose, actively promoting and using it as part of the self-care offer, and is updated accordingly. This might involve attending meetings to influence its ongoing design.
- A range of forums and networks are important for the voluntary sector to communicate and organise itself. The facilitation of these forums would form a crucial role for any infrastructure organisation receiving funding.

- There should be a strong network within the voluntary sector which allows for some kind of a peer-to-peer / mentoring / buddying scheme in which leaders of the voluntary sector can consult one another for advice. Additionally, this network could be useful if a particular organisation is lacking a resource or requires short-term assistance with a problem, with other parts of the sector lending a helping hand.
- There should be facilitation of a peer-to-peer scheme in which leaders of the voluntary sector can consult one another for advice.

Representation

The sector's voice needs to be effectively represented on the various boards which discuss and decide on policy

- In order for policies to benefit the voluntary sector its voice needs to be effectively represented on the various boards which discuss and decide on policy. The sector needs to be a part of the conversation which influences policy and strategies. The representatives on these boards should be regularly reviewed to ensure the most relevant person attends and is making the most of the opportunity. Attending all the relevant boards and meetings is a large undertaking, however they provide opportunity for networking, forming partnerships, and career development (be this informal, or through a formal qualification such as CPD).
- Merton has a large and diverse voluntary sector with over 700 individual organisations. Any infrastructure support organisation will need to demonstrate how many of these organisations it is reaching, as this should be a universal offer to the sector.

WELLBEING SERVICES

What service is this funding for?

We are looking to commission a number of organisations to provide low level preventative support and services that enhance a person's wellbeing and independence. The Wellbeing Grants Programme will commence from April 2019 for a period of 3 years.

The World Health Organisation defines Wellbeing as:

'A dynamic state of physical, mental and social wellness; a way of life which equips the individual to realize the full potential of his/her capabilities and to overcome and compensate for weaknesses; a lifestyle which recognizes the importance of nutrition, physical fitness, stress reduction, and self-responsibility. Well-being has been viewed as the result of four key factors over which an individual has varying degrees of control: human biology, social and physical environment, health care organization (system), and lifestyle'.

The Merton Adult Social Care Wellbeing programme will align the scope of work with the World Health Organisation definition and include all residents of Merton who would benefit from the objectives outlined in the Programme.

The Care Act 2014 describes 'Wellbeing' as relating to the following areas:

- Personal dignity (including treating the individual with respect)
- Physical and mental health and emotional wellbeing
- Protection from abuse and neglect
- Control by the individual over day to day life (including over care and support provided and the way it is provided);
- Participation in work, education, training or recreation
- Social and economic wellbeing
- Domestic, family and personal,
- Suitability of living accommodation
- The individual's contribution to society

The Care Act states that local authorities should actively promote wellbeing and have different types of support, services, facilities and resources that help a person avoid developing needs for health and social care support. The Wellbeing Grants Programme will commission early interventions that promote wellbeing and are delivered via either targeted casework, advice and support, and Community-Based Support and Services. Services funded through this programme are part of a wider landscape of prevention and wellbeing services commissioned by the council and our partners. To ensure the best reach for finite resources we will try to avoid duplication with other council and health programmes.

The Ageing Well Programme commenced as a national programme commissioned by the Department of Work and Pensions and led by the Local Government Group (LGA) in 2010 to promote the independence and wellbeing of older people. The key

aims were refreshed for Phase 2 of the Ageing Well Programme, run from April 2016 to date, to focus on promoting independence.

It has been recognised that there are now gaps in the programme which need to be addressed and therefore it is the intention to widen the focus of the Programme to include all residents of Merton who would benefit from the key features.

What time period will the funding run for?

2019/20 – 2021/22

What are the key features of this service?

Prevention

Preventative support and services will be delivered via the Wellbeing Programme either through face to face 1-1 support or community-based support and services

Prevention model:

1. Specialist

Aims to support residents with social care needs or established health conditions.

2. Early Intervention

Aims to support residents who are on the cusp of social care need, illness or those with long term conditions.

3. Universal

Aimed at residents with no social care needs, symptoms and at risk of long term conditions.
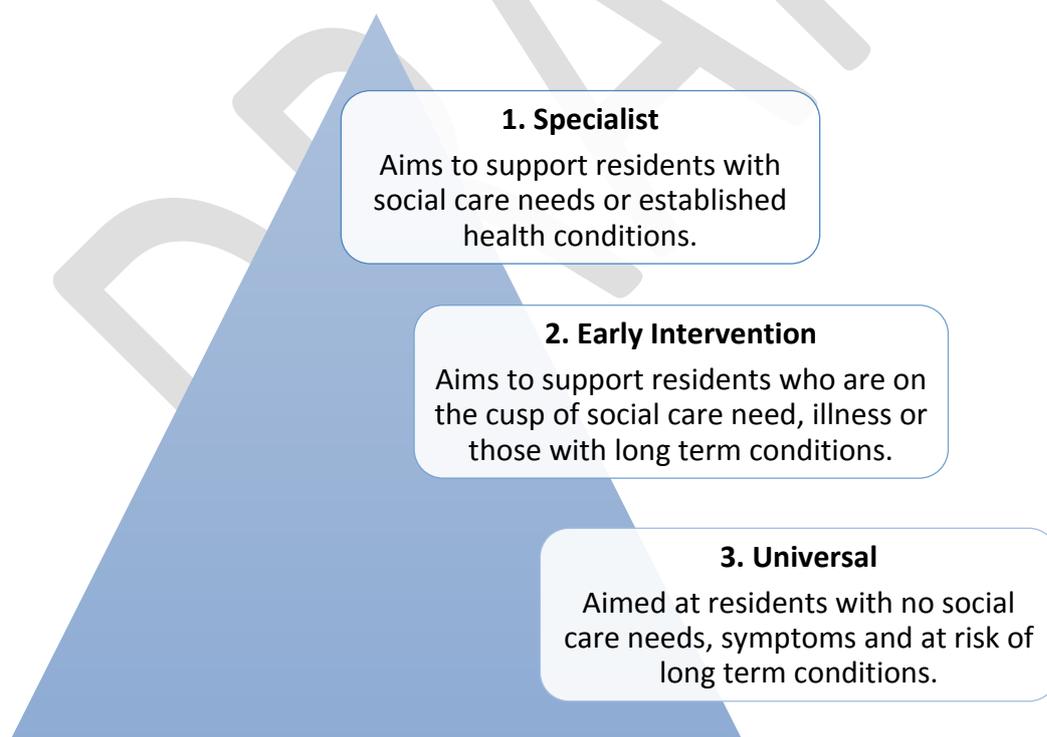
- ▪ The Wellbeing Programme aims to support residents within tiers 2 and 3 of the Prevention Model, however we would expect customers in tier 1 to be referred to the Wellbeing Programme to enhance their wellbeing. Customers in tier 1 would normally present to Adult Social Care via the hospital or community. Adult Social Care will work closely with the Wellbeing Programme

to ensure people are appropriately referred to ensure that their needs are met where possible and that people know the range of services and support available locally for them to regain/remain independent.

- The Wellbeing Programme will support people who would be classified in tier 2 (residents who are either on the cusp of social care need, illness or those with long term conditions) and tier 3 (residents with no social care needs, symptoms and at risk of long term conditions) to go directly to digital self-care services and/or the services in the community and voluntary sector for support. Successful applicants of the Programme will need to ensure that a strong network is developed and services are promoted via digital platforms.

- This programme therefore encompasses interventions before any dependency is imminent, intervention at the point that someone is showing signs of ill-health or to recover their functional capability, and intervention after someone has already presented at hospital or social care to de-escalate the immediate crisis and reduce their impending dependency on long term care and support.

Social Interaction

The programme aims to promote social interaction to reduce isolation and loneliness

- Services should encourage social interaction and build connectedness through community and neighbourhood assets. This could be through helping people keep in touch with their local community and the people that matter to them through eating together, going out and about together or sharing an interest or activity. This could be through helping people get out and about in their local community (shopping, walking, visiting friends and family), accessing their local community activities (such as exercise classes, walking groups, adult learning, shared interest groups) and leisure facilities (local leisure centres, libraries, local parks, cinemas, restaurants). People may need support to access activities for the first time as there may be a fear of going alone, or lack of confidence with getting to an activity. Some people may also need ongoing additional support due to their disability, illness or impairment.

- Some community activities provide accessible platforms for people to make new friends and receive peer support. This could be through a shared interest, shared culture or shared circumstances.

- For people who are unable to get out and about, we would look for interventions that support people to access practical help to feel comfortable, safe and less isolated such as support at home, befriending, assistive technology options, online community networks and meals delivery services.

- Support should promote an asset-based approach, which is an integral part of community development. This is achieved through facilitating people and communities to come together to achieve positive change using their own knowledge, skills and lived experience of the issues they encounter in their own lives.

- Services need to recognise that everyone can make a contribution. Services should promote volunteering activities that involve spending time, unpaid, doing something that aims to benefit the environment or individuals or groups other than (or in addition to) close relatives. In Merton, the aim is that every resident will be able to give time to their community – be it for one hour every now and then or several hours a week.

Promote Independence

Person-centred services should help people find their own solutions in their own lives to promote independence

- Services will need to adopt an asset based approach, making every contact count to help people to identify how they can improve their wellbeing. This could be through the use of outcomes-based assessment tools. Some services will need to visit people in their own homes and other support services may be accessed via community hubs. Some person-centred advice and support interventions will be responsive on the presenting need, where others take a more holistic and longer term approach to supporting individuals with other underlying needs and complex issues.
- Short term interventions could include referrals to other agencies that can assist someone in their own home to promote independence, supporting people to access community based activities, identifying assisted travel options, or help to complete forms and organise someone's life.
- Longer term interventions support people to meet their personal aspirations so they can continue to live independently with confidence. This could include coaching and peer support programmes to support some to build their confidence and motivation, help to work through complex issues, refer for counselling support, help to access training, work and volunteering initiatives.
- Services could support people to regain independence after hospital admission and prevent re-admission. Services will need to work in collaboration with health and social care services through restorative support which enables people to regain independence and promote self-care. For example, after rehabilitation or reablement services, the voluntary sector could support people with low level interventions such as help with shopping, getting out and about, activities that develop someone's confidence or better balance. Services should enable people to develop confidence about their lives now and in the future and have access to what is available locally to support them.

Support and activities need to promote healthy minds and active lifestyles. Better health and wellbeing is associated with building resilience and the ability to bounce back from adversity

- Research by a number of agencies has highlighted the importance of eating well, reducing sedentary time and increasing physical activity to promote the mental and physical wellbeing of disabled people, older people and those with long term conditions. Physical activity can improve strength, balance, stamina and other elements of physical wellbeing and it can also have a significant impact on mental health, social connection and an ongoing commitment to self-care. It is important to have a diverse range of activities that promote healthy minds, reduce sedentary time and increase active lifestyles that builds on local evidence.

- By making social connections and developing relationships people can improve their mental wellbeing. Mind recommend 5 ways to improve Wellbeing-Connect, Be Active, Take Notice, Learn and Give.

- The Wellbeing programme aims to engage with people to improve their access to wellbeing and physical activities in their lives and increase participation whatever someone's circumstances. For some people this may be about supporting them to make changes in their lifestyle, diet and routine. It may be about increasing their confidence and motivation after an illness, fall or time in hospital. We need to ensure that activities are fun, welcoming and have an impact on a person's wellbeing.

Supporting Carers

The programme will need to ensure that carers and families are recognised, supported in their role and referred to the appropriate agency where required

- All Wellbeing Services should ensure that they adopt a Think Family approach where relevant, to ensure that the support provided by the Wellbeing Programme is coordinated and takes account of how individual problems affect the whole family.

- Whilst we aim to commission a separate carers service, carers have a range of needs and will present everywhere, so we expect all partners to understand their needs. If a carer is identified and they require support with their caring role, all organisations must signpost and where applicable, with consent, refer to the appropriate Carers Service.

Promote the use of technological activities and solutions

- Services will need to ensure that they support and upskill people to make the best use of technological solutions. This could be via a centralised digital hub for information to promote wellbeing or self-care digital communities which promote individuals sourcing their own solutions. For example, making better use of technology to support community networks when people struggle to get out and about.
- We would like people to be assisted to use technology to access information and advice through digital information hubs, learn new skills, access online community networks and purchasing aids, equipment and telecare to promote independence.
- Any organisation which is funded via the programme should engage fully in the 'All Services Hub', ensuring it is fit for purpose and is updated accordingly. This might involve attending meetings to influence its ongoing design.

Partnerships

The Wellbeing Programme would encourage partnership arrangements such as joint working, joint funding bids or forming consortia.

- A key success of the wellbeing grants programme will be working collaboratively in partnership to support residents effectively. Organisations should consider how they deliver services to avoid duplication. With regards to funding, smaller organisations should consider joining with others to put forward more robust bids to the programme.
- People will present where they feel comfortable so we would require partners to be aware and have an understanding of the wider needs of the community and signpost and follow up on this accordingly. The programme will also need to ensure that irrespective of where someone lives within the borough, there is equality of access to support and services.
- Wellbeing Services will align with the Strategic Partner Programme and the wider Merton prevention offer. Successful bidders will be expected to work in collaboration with the strategic partners, social prescribing programme, commissioned services and other care navigation initiatives to ensure that these link closely together, creating clear pathways to support residents.
- Providers will seek opportunities for the wellbeing provision to work in partnership with other services (e.g. primary care) and deliver in part from any new facilities that may be developed over the lifetime of the grants programme, e.g. the Wilson Health and Wellbeing Campus.
- A network will be established with all Wellbeing Programme providers to give an update on the services they provide, any issues faced and provide peer support to each other. Successful applicants would be encouraged to work

collaboratively with social prescribers / care navigators to provide a co-ordinated approach across the borough.

A Quality Service where outcomes are achieved and make a difference to person's wellbeing

- It is imperative that the services provided via the Wellbeing Services have systems in place to measure outcomes achieved with customers. Quality assurance processes will need to demonstrate that services are fully utilised and beneficial to the customers that access them.
- A monitoring system (such as quarterly reports, customer satisfaction surveys and consultation events) will be built into the Wellbeing Services to ensure that support and services are of high quality and are reaching the diverse population of Merton who need help to avoid developing needs for health and social care support.
- Activities that promote Wellbeing need to be evidence-led on what works. The programme will look to build on what we have already got within Merton, stretching and developing the best of our current offer and disinvesting where we cannot evidence gain.
- It is imperative that there is a level of flexibility with all bids so if the demand for Wellbeing services changes, organisations can adapt and respond to the needs of Merton residents who would benefit from preventative services.

Establish an Innovation Fund to support key projects where gaps in provision are identified or where a service has an innovative idea to support residents make significant positive changes to their Wellbeing

- With the expansion of social prescribing across the borough, and other care navigation and outreach support, we anticipate certain gaps in service provision to be identified. An innovation fund will be developed for organisations to access small/medium grants throughout the 3-year Wellbeing programme to support key projects which use innovative ideas to promote wellbeing. The fund would support social enterprise style bids.

CARERS SERVICES

What service is this funding for?

We are looking to commission a service where Adult Carers (people over 18 caring for another adult) in Merton can access a range of interventions, activities, and support to assist them in their caring role. The Care Act 2014 defines a carer as someone who helps another person, usually a relative or friend, in their day to day life. This is not the same as someone who provides care professionally, or through a voluntary organisation. The Carers services will use a model of comprehensive, holistic carers support developed by the Carers Trust in conjunction with Association of Directors of Adult Social Services (ADASS). The Carers Support Hub will adopt a whole family approach and will refer any young carers to the relevant pathway.

What time period will the funding run for?

2019/2020 - 2021/2022 (3-year programme)

What are the key features of this service?

Identification and recognition

Supporting those with caring responsibilities to identify themselves as carers at an early stage, recognising the value of their contribution and involving them from the outset in identifying what support is available to them

- The service will need to include information and advice for families and carers in Merton. The service would need to maintain a register and provide regular information to enable carers to keep updated on events, information, support and advice.

- Support will be given to ensure that carers (including new carers):

  o Have the information, advice and support to make choices about their future in their role as a carer
  o Are claiming/receiving all the income and /or benefits that they are entitled to
  o Are benefiting from available grants or services that could improve their financial situation
  o Have learnt some useful information about the conditions of the person they care for
  o Have access to information about their rights and entitlements as a carer
  o Have someone to speak up for them when they need it

Enabling those with caring responsibilities to fulfil their education and employment potential

- The service would support carers choosing to engage in work, training and education or volunteering and promote awareness to employers in the borough on how to support staff who are carers. The service would also support carers to:

  o Engage in recreational and stimulating activities and to make use of community facilities and services to promote mental activity and motivation.
  o Facilitate carers to express their views and make a difference and enable carers to regain control of their lives.
  o Identify ways to help carers have control over their lives and to do the things they want to.
  o Have opportunities to express their views as a carer and feel that they can contribute or make a difference.

A life alongside caring

Personalised support both for carers and those they support, enabling them to have a family and community life

- The service would support carers to complete statutory Care Act Carers Assessments (and support plans where appropriate) which would identify whether the carer is willing and able to continue to provide care, the impact of caring on their own wellbeing, how the provision of support would enable a carer to achieve their desired day to day outcomes and how the carer can gain access to resources or support from the wider community.
- The service will need to ensure that Carer Assessments are appropriate and proportionate to the presenting needs of the carer. The assessment process will be a key element of the prevention agenda which will identify needs that can be reduced and a carers' wellbeing improved by providing access to other preventative services. Therefore, for some carers a Wellbeing Assessment will be completed to support carers address their presenting need.
- For other carers, full holistic Carers Assessments and support plans will be completed. If a carer has eligible ongoing needs, a support plan will be developed. This support plan may result in a carer's personal budget, or their needs may be met in other ways. This other support might include a Carers Discretionary Grant for carers to spend to support their caring role.
- It will be the responsibility of the Carers Services to determine eligibility for and distribute the Carers Discretionary Grants. Clear pathways and monitoring will be established with Adult Social Care to ensure equality of access to this grant.
- Staff will need to access appropriate training to ensure that they are competent, adhering to the duties within the Care Act 2014.

Supporting carers to remain mentally and physically well by promoting access to a range of health and community resources and wellbeing programmes

- Following recent local research, it was acknowledged that caring for a loved one can often be a barrier to leading healthy lifestyles e.g. being physically active. The service will need to work in partnership to maintain opportunities for social, emotional, peer and community support and enable carers to develop strategies for coping with stress and exhaustion. Where required, the service will facilitate future planning with carers and risk/crisis management strategies and how to access opportunities to stay physically healthy and mentally well.

Technological Solutions

Promote the use of technological activities

- Services should, where appropriate, refer carers to technological activities to support their caring role. This could be via a centralised digital hub for information to promote carers wellbeing or self-care digital communities which promote individuals sourcing their own solutions. Services should promote the use of online forums that support carers, particularly for people who are caring for someone with a long term condition or illness.

Quality

A Quality Service

- It is imperative that the services provided via the grants programme have systems in place to measure outcomes achieved. Quality assurance processes will need to demonstrate that the services are fully utilised and beneficial to the carers that access them. It is imperative that there is a level of flexibility with all bids so if the demand for carers services changes, organisations can adapt and respond to the needs of Merton residents who would benefit from this service.
- Due to the statutory nature of the carers service, monthly monitoring reports will be required to be sent to Adult Social Care to identify interventions, assessments and outcomes. A monitoring system (such as quarterly reports, customer satisfaction surveys and consultation events) will be built into the carers services to ensure that support and services are of high quality and are reaching the diverse population of carers in Merton.

HEALTHWATCH MERTON

What service is this funding for?

The Health and Social Care Act 2012 replaced the previous public and patient engagement mechanism, Local Involvement Network (LINk), with a new body called Local Healthwatch (LHW). The Act requires local authorities with adult social care responsibilities to commission a Local Healthwatch from 1 April 2013. This prospectus is for the continued provision from April 2019 of a local Healthwatch in the London Borough of Merton: hereinafter called Healthwatch Merton.

Healthwatch Merton has been provided since April 2013 and the provider from 2019 is expected to coordinate and build upon on all of the existing mechanisms for engaging users of health and social care services, both those established by Healthwatch Merton to date and the wider networks of user-led organisations. It will also be expected to maintain and develop the relationships that engage communities, patients, service users, and carers, bringing a strong voice to the Health and Wellbeing Board, which Healthwatch Merton is a member of.

Healthwatch Merton must continue to be accessible and accountable to all who wish to engage with it. We expect Healthwatch Merton to continue to be a robust and credible organisation by demonstrating that it has the appropriate level of skills and competencies required to deliver its functions to the highest possible level and to achieve the outcomes required.

Background

Healthwatch Activities[1] -
The Health and Social Care Act 2012 sets out that local Healthwatch will:

- Provide information and advice to the public about accessing health and social care services and choice in relation to aspects of those services;
- Make the views and experiences of people known to Healthwatch England helping it to carry out its role as national champion;
- Make recommendations to Healthwatch England to advise the Care Quality Commission to carry out special reviews or investigations into areas of concern;
- Promote and support the involvement of people in the monitoring, commissioning and provision of local care services;
- Obtain the views of people about their needs for and experience of local care services and make those views known to those involved in the commissioning, provision and scrutiny of care services and
- Make reports and make recommendations about how those services could or should be improved

What time period will the funding run for?

2019/20 – 2021/22

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[1] DH publication gateway ref 17286 title: "Local Healthwatch: A strong voice for people – the policy explained" section 4. http://healthandcare.dh.gov.uk/healthwatch-policy/

What are the key features of this service?

The expectations we have for Healthwatch Merton are based on guidance from Healthwatch England set out in their document "Local Healthwatch Quality Statements[2]". These are divided in to five groups:

Strategic Context and Relationships – Having a strong understanding of the strengths and weaknesses of the local health and social care system is critical to the success of local Healthwatch.

Community Voice and Influence – Local Healthwatch enable local people to have their views, ideas and concerns represented as part of the commissioning, delivery, re-design and scrutiny of health and social care services.

Making a Difference Locally – A local Healthwatch needs to formulate views on the standard of health and social care provision and identify where services need to be improved by formally or informally collecting the views and experiences of the members of the public who use them.

Informing People – A core part of the role of local Healthwatch is to provide information about local health and social care services to the public.

Relationship with Healthwatch England – Local Healthwatch work with Healthwatch England to enable people's experiences to influence national commissioning, delivery, and the re-design of health and social care services.

Strategic Context and Relationships

The credibility of Healthwatch Merton is rooted in its knowledge of local services, its impact on local people, and its ability to establish effective working relationships with key stakeholders. A key factor in building the credibility of Healthwatch Merton is using this insight to inform their priorities and sharing this insight with others.

Local Healthwatch should work with existing networks, build relationships and ensure that the voice of the public is heard. They should also work with additional networks to ensure that every section of the community, including seldom heard groups, are engaged and listened to.

There are many ways local Healthwatch can contribute to the development of decision making structures, such as helping a provider set up a patient participation group or advising a commissioner planning a public consultation.

Healthwatch will be expected to participate and actively contribute to the Health and Well Being Board. In addition, Healthwatch should highlight it's work to the Council Scrutiny function, be involved in local programme delivery such as the Wilson project, Merton Health and Care Together Programme, and support Safeguarding in the borough. Healthwatch should be expected to use volunteers and collaboration with other local Healthwatch organisations to ensure representation on other local, sub-regional and regional health and social care structures

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[2] https://www.healthwatch.co.uk/sites/healthwatch.co.uk/files/20160222quality_statements_1.pdf

Please set out how your organisation would meet the outcomes set out below:

1. Healthwatch Merton develops priorities based on the experience and concerns of the public, whilst recognising the local health and social care context and priorities.
2. Healthwatch Merton has trusting, collaborative relationships with key local decision makers through regular formal and informal meetings where its role as a critical friend is understood.
3. Healthwatch Merton plays a clear and distinct role in key local decision making structures and contributes to better local decision making.
4. Healthwatch Merton contributes to the development of decision making structures in the local health and wellbeing system and, where appropriate, their delivery.

Community voice and influence

Healthwatch enables local people to have their views, ideas and concerns represented as part of the commissioning, delivery, design and scrutiny of health and social care services. Healthwatch enables and support local people to understand how their health and social system works, express their views and share their experience. Healthwatch also has a role ensuring the voices of the vulnerable, disadvantaged and people and communities who are easily ignored or excluded are listened to.

Healthwatch also needs to be flexible in order to react to changes in services by local health and social care commissioners.

Please set out how your organisation would meet the outcomes set out below:

1. Healthwatch Merton has a clear action plan for reaching out to and informing local people of its priorities and activities.
2. Healthwatch Merton has made a distinct contribution to improving engagement with seldom heard communities.
3. Healthwatch Merton supports local people to share their experience and opinions of local services.
4. Healthwatch Merton involves local people in setting priorities and commenting on the quality of local Healthwatch activities.
5. Healthwatch Merton provides pathways for local people to become involved informally and formally in contributing to the delivery of local Healthwatch activities and makes the best use of local networks.
6. Healthwatch Merton contributes to the increased confidence and ability of local people to influence the local health and wellbeing system.
7. Healthwatch Merton encourages and enables local commissioners and providers of health and social care services to engage the public.

Making a difference locally

Healthwatch needs to formulate views on the standard of health and social care provision and identify where services could be improved by collecting the views and experiences of the members of the public who use them. It has an important role to play in raising issues that are important to members of the public, and which otherwise commissioners and providers may not give due attention to. It is important that it uses, and promotes the use of, a coherent methodology when collecting the views of the public as well as developing a clear plan for working with wider local networks.

Please set out how your organisation would meet the outcomes set out below:

1. Healthwatch Merton captures the experience and aspirations of local people in its research and reports.
2. Healthwatch Merton collects public opinion on issues in a way that is appropriate and ethical.
3. Healthwatch Merton uses the opinions and experiences of the public, where appropriate, to produce recommendations for change.
4. Healthwatch recommendations for change are heard and responded to by relevant decision makers.
5. Healthwatch should use its networks, and skills to seek additional funding for bespoke work outside the core function supported by this grant.

Informing people

A core part of the role of local Healthwatch is to provide advice about local health and social care services to the public. Members of the public may be more likely to share their experiences with local Healthwatch if they perceive the organisation to be credible. This means that they receive good quality advice, information and signposting services and believe that the organisation will seek to address any concerns that they raise about local health and social care services. It important that local Healthwatch is aware of other organisations that also provide these services so that they can avoid duplication. Healthwatch should provide appropriate advice and information to those making complaints, whereas additional support or advocacy will be provided.

Healthwatch should aim develop good relations and data sharing arrangements with the Health Complaints Advocacy service, currently provided by POhWER.

Please set out how your organisation would meet the outcomes set out below:

1. Healthwatch Merton provides the public with accurate, reliable, relevant and useful information about local services, when they need it, in an accessible format
2. Healthwatch Merton considers the needs of easily ignored and marginalised groups in the design, focus and delivery of the information and signposting service.
3. Healthwatch Merton has a clear map of signposting services and refers members of the public to appropriate services or to places they can access information and signposting services.

4. Healthwatch Merton provides members of the public with appropriate advice and information if they need to raise a complaint about any part of the health and social care system.
5. Healthwatch Merton systematically uses the intelligence it gathers in its advice and information role to inform its priorities.

Relationship with Healthwatch England

Healthwatch Merton works with Healthwatch England to enable people's concerns to influence national commissioning, delivery, and the re-design of health and social care services. Sharing reports, recommendations and issues identified at a local level enables a national perspective to be developed, incorporating local views from across the network. Issues that cannot be resolved locally can also be passed on to Healthwatch England to consider at a national level.

It is also vital that Healthwatch Merton works collaboratively with other local Healthwatch groups, especially in South West London.

Please set out how your organisation would meet the outcomes set out below:

1. Healthwatch Merton learns from and shares their learning with other local Healthwatch.
2. Healthwatch Merton consistently shares the views and experiences of local people with Healthwatch England to be reflected in national work.
3. Healthwatch Merton has given consideration to getting involved with national pieces of work, identifying the relevance of this work for their locality.
4. Healthwatch Merton has discussed any concerns and issues that Healthwatch England or other partners have raised about its effectiveness and reflected on how best to resolve the situation in a constructive manner.
5. Healthwatch Merton contributes its expertise to national policy development.

Organisational Structure

Legislation requires a Local Healthwatch to be a not for profit organisation, which will be able to employ its own staff, involve volunteers and sub contract if it chooses to do so. Healthwatch Merton must also make it clear how individuals and organisations will be able to influence the decisions taken by Healthwatch.

Healthwatch Merton must comply with both the General Data Protection Regulations and the Freedom of Information Act 2000 and ensure that Healthwatch participants are aware of their responsibilities under both of these measures. It will also be subject to public sector duties such as the Equality Act 2012.

Healthwatch must be committed to safeguarding and promoting the welfare of adults, children and young people and expect all staff and volunteers to share this commitment, and to be effectively trained in all aspects of safeguarding legislation and practice. This will include provision for enhanced DBS checks for all staff and volunteers.

Healthwatch Merton will use the official branding provided by Healthwatch England under license from the Council. Healthwatch Merton may also use a website design provided by Healthwatch England but will need to adapt it and make arrangements for the hosting of the website.

VALUES AND PRINCIPLES OF JOINT WORKING

Joint working and collaboration

To meet individual needs or tackle a wider strategic issue we will need to work and think together, drawing on the diverse skills, knowledge and experience of the Strategic Partners. It means working constructively to deliver the best outcome for Merton residents and sometimes putting organisational interests to one side to consider what's best for all. This means good communication, taking responsibility, mutual respect and looking to how we can all contribute to the wider objectives of the Strategic Partner Programme. It also means individual Strategic Partners stepping forward to take the lead on behalf of others.

Building and fostering trust

Working in ways that foster trust between Strategic Partners and within the wider Merton Partnership and that actively supports a collaborative working relationship.

Flexibility and adaptability

We know that needs will change and that best practice in terms of what works is constantly evolving. The resources available to the public sector will continue to reduce year on year for the foreseeable future. The Programme and the Strategic Partners, within finite resources, must be prepared to adapt to best meet the needs of residents.

Mutually supportive

The situation our organisations face is increasingly complex and potentially stressful for our people – paid staff and volunteers. We need to be supportive of each other and the individuals who work in those services. This needs to be reflected in how we treat each other and how we look after our staff by giving them good quality training, opportunities for learning and to support them through difficult/stressful situations.

Evidence-based

The design, delivery and evaluation of services must be evidence based. We need to ensure that evaluating and demonstrating impact and delivering value for money is built into the fabric of the Strategic Partner programme itself. Where services cannot demonstrate impact or someone has a better way of delivering outcomes we must be prepared to change how and what we deliver.

Quality assurance

Quality assurance mechanisms need to be built into to service delivery to ensure the best standard of support is being consistently delivered.

Compact working

Working in ways that meet and support the principles enshrined within the Merton Compact.

Community Plan

Support the delivery of Merton's Community Plan, actively contributing to 'bridging the gap' between the east and the west of the borough.

Disagreements

Raise points of concern with the Merton Partnership in a timely and appropriate way, in line with the council's formal escalation procedures (N.B. to be developed). In accordance with this procedure, raise concerns informally through conversation with the Council, before they develop into more serious disagreements or issues. Please make sure that you have carefully checked the facts / evidence before raising a concern. Where disagreements cannot be resolved in a constructive manner, follow the Compact dispute resolution procedure or the complaints policy of the relevant body, as appropriate.

September 2018

- The prospectus will be taken to Cabinet on 17th September 2018, who will agree to the proposed framework and awarding process.

October 2018

- The Strategic Partner programme will be advertised to prospective providers.

November 2018

- Merton Council will convene a funding panel.

December 2018

- All applicants will be notified of the outcome.

March 2019

- Funding agreement and monitoring arrangements will be finalised between Merton Council and the chosen providers.

April 2019

- The newly funded services will begin and Merton Council will publicly promote its new strategic partners.

Information: *"Providing factual, current, and impartial information to clients"*

Information is considered to be any fact, set of facts, or knowledge, and can be communicated by others or obtained by personal study or investigation. Information is factual and is not based on opinion or one person's point of view; therefore it is normally something you can rely on. Good quality information should be consistent across organisations, and might involve the passing of information verbally, or the provision of informational material online or in the form of leaflets. An information service gives clients the information they need, for them to know and do more about their situation. Responsibility for taking any further action rests with the client.

Advice: *"Presenting ideas in an accessible form for clients to consider"*

Advice is normally given if a person provides more information about their situation. Advice should be tailored to the person's experience and knowledge and is the application of information to fit the client's individual needs and circumstances. Advice under these circumstances might involve offering a diagnosis of the client's enquiry and explaining the legal issues involved, offering positive or negative recommendations, providing information and explaining options, or identifying further action the client can take. Responsibility for taking further action based on this advice rests with the client.

Casework: *"Assisting clients through a more long-term process of support"*

Casework might be appropriate as a result of a client's needs and/or the complexity of their issue, and clients may also require more comprehensive wrap-around support. Casework includes all the elements of an advice service, but might also involve taking action on behalf of the client to move the case forward. This might include representing clients by negotiating on their behalf with third parties. This will usually involve follow-up work and the adviser would take responsibility for this. Clients should be developed in building their levels of resilience and ability to self-support.

Specialist Legal Representation: *"Officially representing a client in a formal setting"*

Specialist representation is relevant to those cases which require legal or quasi-legal intervention or court appearances. This might include representations being made at a formal meeting and court or tribunal appearances, such as in the course of a benefits appeal. Legal representation requires someone to identify the facts and grounds on which to challenge a decision or assert a right as well as a clear understanding and experience of the court or tribunal process to effectively carry out their duty.

APPENDIX 2 – COLLABORATIVE WORKING GROUP

We would like to thank those who have taken part in the Collaborative Working Group, providing insight into the voluntary sector and assisting in shaping this document. The group have been incredibly enthusiastic and have worked hard to ensure that what will be commissioned best reflects the needs of residents and maximises the opportunities for joint working. The group has shown how co-production can deliver a really positive set of outcomes and has set the benchmark for how the strategic partner programme is delivered on the ground. We would like to give a special thank you to the following individuals who have given their time and enthusiasm to this process to date:

- Hannah Doody – Director of Community and Housing – Merton Council (co-chair)
- Suzanne Hudson – Chief Executive – Citizens Advice Merton and Lambeth (co-chair)
- Amanda Roberts – Policy, Strategy and Partnerships Officer – Merton Council
- Andrew Whittington – Chief Executive – South West London MENCAP
- Barry Causer – Head of Strategic Commissioning (Public Health) – Merton Council
- Fitzroy Dawson – Chief Executive – Merton Community Transport
- Hannah Pearson – Commissioning and Service Improvement Manager – Merton and Wandsworth CCGs
- Heather Begg – Business Process Lead (Adult Social Care) – Merton Council
- John Dimmer – Head of Policy, Strategy and Partnerships – Merton Council
- Keith Shipman – Social Inclusion Manager – Merton Council
- Khadiru Mahdi – Chief Executive – Merton Voluntary Service Council
- Kris Witherington – Consultations and Community Engagement Manager – Merton Council
- Lyla Adwan-Kamara – Chief Executive – Merton Centre for Independent Living (MCIL)
- Max Lawson – Policy Officer – Merton Council
- Melanie Gonga – Director and Head of Legal Practice – Springfield Advice and Law Centre
- Navroop Kullar – Assistant Director (London) – Imagine Independence
- Patrick Marples – Chief Executive – South West London Law Centres
- Phil Howell – Head of Older People and Disabilities – Merton Council
- Richard Ellis – Head of Strategy and Partnerships (Community and Housing) – Merton Council
- Rob Clarke – Chief Executive – Age UK Merton
- Steve Langley – Head of Housing Needs – Merton Council
- Tracy Weight – Chief Executive – Carers Support Merton
- Wendy Pridmore – Chief Executive – Wimbledon Guild

APPENDIX 3 – APPLICATION WEIGHTING

The following table represents the weighting given to each feature of the application:

Criteria	Demonstrates	Weighting
Meets requirements	• Alignment with key features set out in the funding prospectus	**40%**
Value for money	• Evidence based methodology • Outputs and impact • Prevents / delays public sector costs	**20%**
Track record	• Delivery / impact • Fundraising / income generation • Partnership and collaborative working / constructive relationships	**20%**
Bridging the gap	• Meets demonstrable needs • Helps deliver LBM equalities duties • Reaches priority client group • Involves service users in design	**20%**