

<b>Task Sheet:</b>	<b>Organising Money Advice</b>
<b>Number</b>	<b>Task Sheet LA08</b>
<b>Timeline</b>	<b><i>Start October 07– complete by March 08</i></b>
<b>Purpose:</b>	Ensures that customers have an appropriate support mechanism in place for money management.
<b>Composition:</b>	<ul style="list-style-type: none"> <li>▪ Options: <ul style="list-style-type: none"> <li>8.1 Explore the range of options available; <ul style="list-style-type: none"> <li>➤ Existing In House providers</li> <li>➤ Appoint new In House service</li> <li>➤ CAB</li> <li>➤ Other external provider.</li> </ul> </li> <li>8.2 If you decide to contract out you should obtain advice on tendering from the council's procurement team and allow sufficient time for the process to be completed.</li> <li>8.3 Draw up specification and liase with potential providers to confirm requirement can be met or use specification to explore the option to recruit new In House Service.</li> </ul> </li> <li>▪ Contract: <ul style="list-style-type: none"> <li>8.4 Go through contracting /recruitment process and iron out any discrepancies.</li> <li>8.5 Sign contract</li> <li>8.6 Appoint advisor(s) – you will need to consider your estimated workload to establish the number of advisors that you would like to appoint.</li> </ul> </li> <li>▪ Communication: <ul style="list-style-type: none"> <li>8.7 Promotion of the service</li> </ul> </li> </ul>

	<p>8.8 Consider producing own leaflets regarding bank accounts and debt advice, advising claimants where to go to seek advice (see Task Sheet LA12).</p> <p>8.9 Staff awareness of the referral procedure, the whole process could fall down if staff do not signpost/refer claimants to the money advisors (see Task Sheet LA14).</p> <ul style="list-style-type: none"> <li>▪ Quality:</li> </ul> <p>8.10 Introduce monitoring process to establish the quality of the service and whether the loading is correct, eg number of referrals, outcome of referrals, time taken to process etc.</p>
<p><b>Notes:</b></p>	<ul style="list-style-type: none"> <li>• Money advice is not just about opening a bank account it is about assisting customers in the management of their money, prioritising their debts etc. Money advisors should be aware of your needs and this should be made clear in the contract / service level agreement.</li> </ul>