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Llywodraeth Cymru  
Welsh Government

**SINGLE ADVICE FUND**  
**2025 - 2028**

**GUIDANCE NOTES**

### INTRODUCTION

1. The Welsh Government is committed to promoting sustainable improvements to the health and well-being of all the people of Wales and recognises social welfare<sup>1</sup> information and advice has an important role in helping people make informed decisions to access their rights to civil justice and ensuring everyone in Wales has a fair and equal chance in life.
2. The Welsh Government introduced the Single Advice Fund in January 2020 to help meet the increasing demand for advice services and ensure that funding would be directed towards strategically planned services that provide access to all the advice a person requires to resolve their social welfare problems.
3. Since January 2020, Single Advice Fund services have helped more than 280,000 people deal with over 1.1 million social welfare problems. Those helped were supported to claim additional income of £137 million and had debts totalling £38.5 million written off.

### GRANT FUNDING - PURPOSE

4. The Single Advice Fund will not offer core funding to information and advice providers. It will fund the delivery of 'free to the client social welfare information and advice services', which demonstrate and evidence how they will '**attain the most effective and sustainable outcomes for those seeking advice**'.
5. The Single Advice Fund aims to offer a positive contribution to help meet the ongoing increase in demand for access to advice services and help to ensure more people throughout Wales have access to the information and advice that they need.
6. It is a principle of the fund that the grant will support the most effective advice providers whether they operate within the third sector, the private sector or within local authorities.
7. The social welfare information and advice services delivered by the Single Advice Fund will focus upon effectively promoting early access to advice amongst people from marginalised and disadvantaged population groups as well as ensuring that people accessing advice are given the opportunity to develop their resilience to future social welfare problems. The fund will also enhance access to services that can deliver the type of specialist advice that people need to resolve complex and often entrenched problems.

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<sup>1</sup> Social welfare advice includes debt, discrimination, education, employment, housing, immigration and welfare benefits.

8. The allocation of the grant funding available across Wales from the Single Advice Fund is based on identified need and in line with the findings of the Welsh Government's independently commissioned report '**A needs analysis and predictive model of social welfare information and advice services in Wales (2023)**'
  9. The Welsh Government recognises that grant funding for advice services ought to be longer-term as this would enable the funded providers to plan more effectively, invest in partnership working, offer greater flexibility in how they manage their services and help with retention of their expert staff.
  10. **The Welsh Government therefore intends to make the grant funding available during the period 01 April 2025 to 31 March 2028.**
  11. Furthermore, it is possible that the grant funding to successful Bidders could be extended beyond the initial three-year period. Near the end of the initial 3 years, rather than re-open a round of competitive funding, a benchmarking exercise will determine whether some organisations could be offered a further award of up to 3 years of funding. Organisations below the benchmarking threshold would not be awarded extended funding under the scheme. At the end of the 6 year period, the grant scheme (if continuing) would then open up for a new round of competitive funding, allowing new and existing organisations to apply for the funding.
  12. The Welsh Government would like Bidders to put forward proposals for how they would deliver a Regional Social Welfare Information and Advice service and/or a Pan-Wales Remote Advice Service or a Standalone Service providing information and/or advice to an underrepresented population group within a region.
  13. Applications for the delivery of a service should meet the requirements set out below and should demonstrate how they will integrate with the other information and advice services supported through the Single Advice Fund.
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## **OPPORTUNITY 1**

### **Regional Social Welfare Information and Advice Service x 6**

14. Bidders are asked to demonstrate how their proposal for a Regional Social Welfare Information and Advice Service will enable the delivery of:
- I. integrated services that are able to identify all the social welfare issues an individual has and offer them seamless access to the type<sup>2</sup> of information, guidance generalist and specialist advice (up to and including tribunal and/or Court representation services) they need on issues with welfare benefits, debt, housing, employment, and discrimination (including education).
  - II. fully accessible services that effectively promote and target early access to advice amongst those in most need in the region, i.e., members of disadvantaged and marginalised population groups.
  - III. services that can offer both prevention and emergency crisis responses.
  - IV. services that will ensure individuals accessing advice are given, as far as practical, the opportunity, through building their awareness, skills and knowledge, to develop their capability and resilience to future social welfare problems occurring.
15. The regional services will predominately be delivered via face-to-face services in accessible locations where people tend to go within local communities across a region. However, during the Covid pandemic all types of advice services across all subject matters were successfully delivered remotely. Therefore, Bidders will be able to recommend means of the delivery of the regional services via other channels, such as telephone and web-based, where these will better meet the particular needs of people who will struggle to, or prefer not to, access face-to-face services. This will apply particularly to rural areas within a region, where a greater proportion of remote delivery may be expected, to enable widespread access and to keep the cost of delivery affordable.
16. Bidders will also be required to propose delivery models that can proactively target early access to services to groups of people who may have a greater need for social welfare advice as a result of specific characteristics they may possess or as a result of the specific circumstances that they are experiencing. The Welsh Government does not wish to be prescriptive over who these groups might be, but they could for example include people experiencing domestic violence or those living with a chronic medical condition. The Welsh Government request that Bidders consider those most in need of advice in the respective region and put forward proposals to ensure access for these groups is prioritised within the service delivery model. Where specific groups of people are being

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<sup>2</sup> See Annex 1 for definitions of types of Information and Advice.

targeted, service models will be expected to incorporate and utilise the expertise of organisations that specialise in supporting those particular groups of people.

17. **The Welsh Government is committed to ensuring that people in Wales claim all the financial support to which they are entitled. Therefore, Bidders are requested to explain how they will make benefit entitlement checks available to all individuals accessing the Regional Social Welfare Information and Advice Service.**
18. A Bidder will need to explain how their proposed service will complement other locally and nationally advice services available to people within the region.

### Area – Regions of Wales

19. Bidders are requested to explain how their proposed service delivery model will effectively coordinate the delivery of services within **all** the individual Local Authority areas in a region and ensure services will be delivered in accordance with the needs of local communities across a region.
20. A proportion of the funds (specified in the table below) must be spent on the provision of debt advice services. This is because these funds have been devolved to Welsh Government through its share of the UK Financial Levy.
21. The Welsh Government will be interested to hear from Bidders how their proposed service delivery model will ease some of the administration pressures upon frontline debt advisors including those generated by managing the administration processes for Debt Relief Orders and applications to the Mental Health Breathing Space debt respite scheme.

### Funding Available

22. A Bidder will be required to submit a budget expenditure profile demonstrating how they intend to utilise the funding on the provision of the information and advice services for the grant period.

<b>Maximum Funding Available</b>	<b>2025/26 £</b>	<b>2026/27 £</b>	<b>2027/28 £</b>
Region 1	<b>£1,224,760</b> *£423,690	<b>£1,224,760</b> *£423,690	<b>£1,224,760</b> *£423,690
Region 2	<b>£1,526,380</b> *£524,900	<b>£1,526,380</b> *£524,900	<b>£1,526,380</b> *£524,900
Region 3	<b>£1,718,320</b> *£594,500	<b>£1,718,320</b> *£594,500	<b>£1,718,320</b> *£594,500
Region 4	<b>£1,581,220</b> *£539,400	<b>£1,581,220</b> *£539,400	<b>£1,581,220</b> *£539,400

Region 5	<b>£1,206,480</b> *£417,310	<b>£1,206,480</b> *£417,310	<b>£1,206,480</b> *£417,310
Region 6	<b>£1,124,220</b> *£388,890	<b>£1,124,220</b> *£388,890	<b>£1,124,220</b> *£388,890

**Important Note: A separate Grant Application Form must be completed for each Regional Social Welfare Information and Advice Service a Bidder is seeking funding for.**

(\* Minimum amounts that must be spent on debt advice services to meet levy-payer obligations.)

## **OPPORTUNITY 2**

### **Pan-Wales Remote Social Welfare Information Advice Service**

23. Bidders are asked to demonstrate how their proposal for a Pan-Wales Remote Social Welfare Information and Advice Service will enable the delivery of:
- I. integrated services that are able to identify all the social welfare issues an individual has and offer them seamless access to the type of information, guidance generalist and specialist advice they need on issues with welfare benefits, debt, housing, employment and discrimination (including education).
  - II. accessible services via remote channels (to include as a minimum telephone and email channels) that can offer both prevention and emergency crisis responses.
  - III. increased service provision at certain times to manage demand generated, for example, by media bursts for the Welsh Government's Claim What's Yours benefit take-up campaign.
24. It is acknowledged that remote advice services will by their nature typically undertake a higher proportion of one-off or enquiry work than face-to-face specialist advice services typically do. Accepting this, the Welsh Government is interested to receive proposals from Bidders that explains how the Pan-Wales Remote Advice Service will offer advice at the specialist level and, where it is in the best interests of the individual, is able to undertake a full case-working service remotely.

### **Area - Pan-Wales**

25. The Pan-Wales Remote Advice Service will be planned and delivered on a pan-Wales basis. However, it is important that Bidders explain how their proposed service delivery model will form links with and complement the Regional Social Welfare Information and Advice Services. For example, setting out how a provider handling the first contact will ensure that an individual is offered direct access to their regional face-to-face caseworker services when needed.
26. The Welsh Government is keen to receive proposals for a Pan-Wales Remote Advice Service which is accessed through a single telephone number, and which quickly enables the person calling to receive the particular advice they require.
27. **The Welsh Government is committed to people in Wales claiming all the financial support to which they are entitled. Therefore, Bidders are requested to explain how they will make benefit entitlement checks available to all individuals accessing the Pan-Wales Remote Advice Service.**

28. The Welsh Government will be interested to hear from Bidders how their proposed service delivery model will ease some of the administration pressures upon frontline debt advisors including those generated by managing the administration processes for Debt Relief Orders and applications to the Mental Health Breathing Space debt respite scheme.
29. A Bidder will need to explain how their proposed service will complement other nationally available remote social welfare advice services, to include those delivering on a UK-wide basis.

### **Funding Available**

30. A Bidder will be required to submit a budget expenditure profile demonstrating how they intend to utilise the funding on the provision of the required Pan-Wales Remote Advice Service for the grant period.
31. The breakdown of available funding for this service is as follows:

<b>Maximum Funding Available</b>	<b>2025/26 £</b>	<b>2026/27 £</b>	<b>2027/28 £</b>
Pan-Wales	<b>£3,018,620</b> *£611,310	<b>£3,018,620</b> *£611,310	<b>£3,018,620</b> *£611,310

**Important Note: A separate Grant Application Form must be completed for the pan-Wales Remote Advice Service.**

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## **OPPORTUNITY 3:**

### **Standalone Service - Regional Grant**

32. The aim of the Single Advice Fund is to support providers who are able to deliver integrated advice services, delivered through all channels that reach people who need advice the most. The value of these integrated advice services to those who are helped by them cannot be overstated.
33. The Welsh Government however will make one grant available in each of the six regions that is outside of that aim of the Single Advice Fund. This grant is in recognition of the valuable support an information and/or advice provider offers to their particular services users within a region and Welsh Government is keen to hear from Bidders who are:
- I. providing information and/or advice to an underrepresented population group within a region, (a Bidder does not need to be offering service users information and/or advice on all social welfare subjects or at all levels) or
  - II. supporting service users to claim all the financial support to which they are entitled, or
  - III. delivering information and/or advice in innovative ways, (a Bidder does not need to be delivering their information and/or advice services through all channels), or
  - IV. focusing on preventative services by understanding the root causes of problems and seamlessly delivering information and/or advice and capability building as an integrated package.
34. A Bidder will need to explain how their proposed service will ensure lived experience is incorporated into the delivery and accessibility of the information and/or advice service to improve access to services, particularly amongst people who tend not to access services until they are in crisis.
35. The Welsh Government is committed to people in Wales accessing quality assured information and advice services and welcome proposals from Bidders who hold an appropriate advice Quality Standard for the service they deliver. However, it is recognised that not all organisations bidding for the standalone grant on offer through opportunity 3 will have completed their journey to holding a Quality Standard.
36. Therefore, to apply for a grant awarded through Opportunity 3 a Bidder **does not** have to hold an advice Quality Standard at the date of the commencement of the funded service, i.e., 01 April 2025. However, the Bidder must provide evidence in their proposal that they are working towards attaining an appropriate Quality Standard. A successful Bidder will be expected to hold an appropriate Quality

Standard within six-months of the date of the commencement of the funded service, i.e., 01 October 2025. **A grant award offered under opportunity 3 will be withdrawn if an appropriate Quality Standard is not in place by this date.**

37. The Welsh Government does not expect an individual organisation will receive more than one grant awarded under Opportunity 3. An organisation who is successful in receiving a grant through Opportunity 1 or 2 will not be eligible to also receive a grant through Opportunity 3.
38. During the first year of receiving the grant, the Welsh Government successful Bidders will be required to form close working links with the Regional Social Welfare Information and Advice Services.

### **Funding Available**

39. A Bidder will be required to submit a budget expenditure profile demonstrating how they intend to utilise the funding.
40. The breakdown of available funding for this service is as follows:

#### **Opportunity 3**

<b>Maximum Funding Available</b>	<b>2025/26 £</b>	<b>2026/27 £</b>	<b>2027/28 £</b>
Standalone Service – Regional Grant			
Region 1	<b>£100,000</b>	<b>£100,000</b>	<b>£100,000</b>
Region 2	<b>£100,000</b>	<b>£100,000</b>	<b>£100,000</b>
Region 3	<b>£100,000</b>	<b>£100,000</b>	<b>£100,000</b>
Region 4	<b>£100,000</b>	<b>£100,000</b>	<b>£100,000</b>
Region 5	<b>£100,000</b>	<b>£100,000</b>	<b>£100,000</b>
Region 6	<b>£100,000</b>	<b>£100,000</b>	<b>£100,000</b>

**Important Note: A separate Grant Application Form must be completed for the Standalone Service – Regional Grant**

## **WHEN TO APPLY**

41. The application to apply for grant funding was published by the Welsh Government on Thursday 25 July 2024 and the deadline for applications is 5pm on Thursday 17 October 2024
42. **Late applications will not be accepted.**
43. The deadline for receipt of any questions relating to the grant will be 5 pm on Thursday 22 August 2024. A list of the responses to all questions asked will be published on the Welsh Government website [here](#) and updated regularly. Any questions should be submitted via [AdviceNetworks@gov.wales](mailto:AdviceNetworks@gov.wales). Interested parties asking questions should do so in the knowledge that their question and the response to it will be published.

## **WHO CAN APPLY**

44. Applications for the funding can be submitted by an individual provider or by a collaboration of providers, although it is anticipated that collaborations of providers will generally be better able to demonstrate how they will meet the full range of advice needs of the diverse communities of Wales.
45. The Welsh Government's Single Advice Fund is a competitive scheme, and the Welsh Government intends to support only one collaborative<sup>3</sup> application per region for services delivered within opportunity one and opportunity two. The Welsh Government intends to support only one application for services delivered within opportunity three. If there are no applications in respect of any particular opportunity that fully and adequately meet the aims and requirements of the grant then Welsh Government reserves the right to support more than one application where doing so would result in combined services that meet the aims and requirements of the grant.
46. Individual bids will be expected to set out proposals that largely utilise the full amount of funding available for each of the six funding opportunities.
47. A collaborative application for funding must identify a lead provider. This lead provider will accept the contractual responsibility for the delivery of the grant funded services.
48. An application must also contain full details of all the other partners who will be involved in the collaborative delivery of the funded services.

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<sup>3</sup> The Welsh Government does not expect a single organisation will have the ability to deliver all types of information and advice on all the social welfare topics and effectively reach and engage with the most disadvantaged and marginalised population groups in a region or on a pan-Wales basis, offering them person-centred and accessible services. However, a single organisation who considers they can meet all the objectives of the Single Advice Fund are able to submit a bid for funding.

49. **The Welsh Government is committed to the people of Wales having access to quality assured information and advice services. In line with this commitment, a provider, in a single or a collaborative funding application for opportunity one and opportunity two who will be involved in the direct delivery of generalist or specialist social welfare advice services must, at the date of the commencement of the funding period, hold a recognised advice Quality Standard at the appropriate level for the service they are proposing to provide.**
50. Acceptable advice Quality Standards include, but are not limited to, the following quality standards that are accredited to the Welsh Government's Information and Advice Quality Framework:
- The membership scheme owned by Citizens Advice
  - The Advice Quality Standard
  - The Specialist Quality Mark
  - Lexcel
  - Families First Quality Award
  - Welsh Women's Aid Quality Assurance Scheme
  - The Trusted Charity Standard
51. A provider who will be involved in the direct delivery of **debt advice** services will, in addition to holding a recognised advice Quality Standard, need to be Financial Conduct Authority (FCA) regulated, or be exempted from having to be FCA regulated, i.e., a Local Authority.
52. A provider whose role does not involve the direct delivery of generalist or specialist advice, does not need to hold an advice Quality Standard. For example, this will include:
- I. a *non-advice delivering partner*, whose role within a collaborative application is to co-ordinate and/or manage the delivery of the funded information and advice services on a local, regional or pan-Wales basis or;
  - II. a provider whose role within a collaborative application, is to facilitate positive engagement with people/groups who are hardest to reach and/or provide information/guidance on social welfare issues and enable a seamless referral of a person to an advice delivery partner.
53. Welsh Government intends this grant to be focussed upon frontline advice delivery. Within a collaborative funding proposal, a *non-advice delivering partner*, whose role is to co-ordinate and/or manage the delivery of the funded services on a local, regional or pan-Wales basis **must be** a Not for Profit organisation who is able to provide evidence of their:

- I. established and successful track record of co-ordinating the delivery of information and advice services and;
- II. comprehensive understanding of the Welsh Social Welfare Advice Sector.

**COMPLETING THE APPLICATION FORM**

54. This guidance has been prepared to help ensure those seeking grant funding include all of the information required for the purposes of assessing their application.

55. Incomplete applications will not be assessed and therefore not considered for a grant.

**Section One – What You Are Applying For**

A Bidder is required to indicate which of the funding opportunities the particular application form relates to by marking the relevant box. Bidders applying for more than one of the opportunities should complete a separate application form in respect of each opportunity.

**Section Two – Organisation/Lead Provider Details**

In a collaborative application (with delivery involving partner providers), the Lead Organisation is required to provide their full contact details in Section Two.

**Section Three – Partner Providers (Collaborative Applications Only)**

This section only needs to be completed if it is a collaborative application. It asks for information about the other provider(s) involved in delivering the proposed service who will receive grant funds.

**Section Four – Quality Assurance**

Any provider(s) who are seeking funding to deliver generalist or specialist advice through Opportunity 1 and Opportunity 2 is/are required to provide:

- I. evidence of the advice Quality Standard that they hold **and** confirm the date at which they will have to reapply for this advice Quality Standard; and
- II. a statement to confirm that they are impartial and have the ability to always act in the best interest of the people who will be receiving the free to client funded advice services; and
- III. if a provider will be delivering a debt advice service, evidence that they are Financial Conduct Authority (FCA) regulated, or confirmation that they are exempted from having to be FCA regulated. A provider who loses their FCA regulation at any point during the funding period shall inform the Welsh Government immediately. The Welsh Government will have the right to withdraw grant funding in respect of the delivery of debt advice services from any provider who loses their FCA regulation, regardless of whether they still hold an advice Quality Standard.

Any provider(s) who are applying for a grant through Opportunity 3 **does not** have to hold an advice Quality Standard at the date of the commencement of the funded service, i.e., 01 April 2025. Please see further detail at point 38 above.

A funded provider who stops holding a recognised advice Quality Standard at any point during the grant funding period shall inform the Welsh Government immediately and the funding will be withdrawn.

A provider, in their acceptance of a grant, will be required to confirm that they (and all the partners in a collaborative application) agree to fully engage and participate within the quality assurance measures that the Welsh Government intends to employ.

### **Section Five – Expected Start Date of Service Delivery**

A Bidder is required to provide confirmation that they can commence delivery of the free to client funded information and advice services from the 01 April 2025.

### **Section Six – About the Proposed Service**

A Bidder is required to respond to a series of questions about how the service that they are proposing to deliver will meet the purpose of the Grant.

#### **Scoring**

The assessment process will include a weighted scoring system. Where a question will be scored, the relevant score weighting is set out after the question.

A summary of the points weighting is as follows:

<b>Question</b>	<b>Maximum Score</b>
1. Prior Experience	20
2. Proposed Service Delivery	25
3. Service Planning & Co-ordination	25
4. Welsh & Community Languages	5
5. Person-centred Services	10
6. Value for Money	15
<b>Total Maximum Score</b>	<b>100</b>

#### **Question 1 – Prior Experience**

This question asks for an explanation of the experience and proven ability of a provider(s) to deliver free to client social welfare rights-based information and advice services at a local, regional or pan-Wales level (as applicable). In a collaborative application, this extends to all of the service providers who will receive part of the grant. Where a collaboration includes service providers who do not provide advice,

but who may for example facilitate engagement or provide another function, then an explanation of relevant experience regarding that function should also be highlighted in your response to this question.

Bidders are also asked to explain their previous experience of involvement in collaborative service delivery models.

## **Question 2 – Service Delivery**

This series of questions explores how the proposed free to client social welfare rights-based information and/or advice service/s will meet the key aims of the Single Advice Fund, including how a proposed service delivery model will:

- i. *Integrated*: Be seamless and fully integrated for people who, for example, have advice needs:
  - across the range of social welfare subject areas, and/or;
  - that pass through various advice types, i.e., guidance to generalist to specialist, and/or;
  - if applicable, who have contacted the pan-Wales service and need to access locally/regionally delivered services.

It is acknowledged that Bidders will not know what other services could potentially be in place through funding under this grant, given that they will be subject to this competitive grant exercise. Bidders are however expected to say in general terms how they will seek to ensure that the service they offer will be joined-up with other advice services, many of which would be funded through other funding streams. They are also expected to confirm their willingness to fully integrate their service with the other grant funded advice services both in their region and across Wales, once successful Bidders are announced, and services are being set up.

To further support joined-up service delivery, Bidders are expected to confirm how they will contribute to and engage with the Regional Advice Network and any advice network partnerships established in their respective regions/nationally.

It is anticipated that effective partnership working will be at the heart of a delivery model that is aligned to the aim and objectives of the Single Advice Fund and a Bidder will allocate some of the available funding in order to build and sustain the network of services that are part of their proposed collaborative delivery model.

The Welsh Government also recognises the importance of partnership working to ensure all the available resources within a region (not just those funded through the Single Advice Fund) are used as effectively and efficiently as possible. Bidders are therefore required to consider how they would use a small amount of the available funding to provide administrative support to the Regional Advice Network Steering Group enabling the delivery of three full Network membership meetings per year.

The extent to which funded services are effectively integrated will be one of the key areas examined through regular grant monitoring.

- ii. *Preventative*: Be focused upon both prevention and emergency crisis response;



- iii. *Capacity building*: be designed to ensure people accessing information and advice services are given tangible opportunities to develop their knowledge, capability and skills with the aim of, as far as practical, improving their resilience to similar problems reoccurring.
- iv. *Accessible*: in the case of regional services, be able to reach into the heart of local communities, ensuring the funded services are well known and easily accessible OR in the case of the pan-Wales remote service, able to achieve a sufficient profile to ensure that the service is well known and easily accessible;
- v. *Holistic*: demonstrate meaningful links with statutory primary care delivery and other wellbeing services within the voluntary and community sectors.
- vi. *Inclusive*: target those people or groups whose characteristics or circumstances make them more likely to be in most need of advice and encourage early access by them to the funded service, demonstrating innovation in reaching people who may not usually access mainstream advice services.

### **Question 3 – Service Planning and Co-ordination**

This series of questions examines:

- i. the robustness of the planning assumptions used to predict the numbers expected to access the service as set out in the Minimum Volume Expectations table in Question 6 of the application form;
- ii. the effectiveness of the planning of the information and advice service to ensure the funded service/s is/are complementary to the advice service resources already operating within a region and pan-Wales, offering an overall positive contribution as a result of available resources being maximised and duplication of effort minimised;
- iii. delivery of information and advice services will be co-ordinated to ensure there is equal and consistent access to the funded service(s) across all parts of a region or, in the case of a pan-Wales service, across all parts of the country;
- iv. how the planning of the information and advice service will ensure the funded service will be delivered in accordance with the specific needs of local communities;
- v. how a system of review and innovation will drive forward continuous improvements in effectiveness and efficiency.

### **Question 4 – Welsh Language and Community Languages**

The Welsh Government requires that the funded service will be offered in the medium of Welsh language to any individuals who states that this is their language preference.

The Welsh Government requires access to interpretation services, across the range of community languages, to be offered, as and when required, to people accessing the funded services.

Therefore, a Bidder will need to clearly explain how their proposed service delivery model will ensure there will be consistent and equal access to people accessing funded services who wish to do so in the medium of Welsh, or in any of the community languages.

### **Question 5 – Person-Centred Services that Contribute to Well-being**

The Welsh Government has a vision for the people of Wales to be served by quality assured and sustainable advice services that are delivering empowering services that are aligned to the Well-being of Future Generations Act 2015.

(<https://www.gov.wales/well-being-future-generations-act-essentials-html>)

In their funding proposal, Bidders are asked to highlight the ways in which their proposed service will contribute to some or all of the seven well-being goals.

1. A prosperous Wales
2. A resilient Wales
3. A healthier Wales
4. A more equal Wales
5. A Wales of cohesive communities
6. A Wales of vibrant culture and thriving Welsh language
7. A globally responsible Wales

In addition, Bidders should describe how they will ensure that service users are involved in the ongoing design and redesign of their service.

### **Question 6 – Value for Money**

Under this question, bids will be scored to prioritise bids that offer the best all round value for money. Specifically, the information provided regarding minimum volume expectations, the average cost per FTE adviser and the anticipated outcomes will be combined to provide a broad picture of value for money that will be scored, up to a maximum of 15 points.

#### ***I. Minimum Volume Expectations***

A Bidder is required to state their minimum volume expectations (per year for the 3 year grant period) for the number of cases and/or enquiries that they expect to undertake.

Bidders should indicate the numbers of enquiries and cases by subject category and by advice level. We appreciate that information and advice providers will use differing definitions of enquiries and cases in their recording. For the purposes of providing an indication of the scale of work that is expected to be undertaken in the proposal, we would ask that Bidders complete this section with reference to the following

interpretation so that applications can be assessed for appropriateness of coverage and to ensure that basic value for money is achieved.

By 'enquiry' we envisage a discrete one-off piece of work with a household seeking advice or information where the time spent on that work typically totals less than 30 minutes.

By 'case' we are referring to work typically totalling 30 minutes or more that may require a greater level of recording than an enquiry and which would more often involve the provision of written confirmation of advice.

Where some parts of the proposed service will only be available to people with certain characteristics or people in certain situations, applicants should provide a breakdown of this in brackets after the total number of cases or enquires, wherever applicable.

In the monitoring reports required under this grant, providers will also be required to provide information on the numbers of people advised, including the proportion of repeat clients, and the number of problems advised upon.

## **II. Proposed Grant Expenditure**

A Bidder is requested to clearly indicate how much Grant funding they are applying for across the funding period.

Bidders are expected to put forward proposals that largely utilise the full amount of funding available for the particular funding opportunity that they are bidding for.

The maximum funding available to deliver the information and advice service in each funding opportunity is as set out in the table below, together with regional, national and programme totals:

<b>Maximum Funding Available</b>	<b>2025/26 £</b>	<b>2026/27 £</b>	<b>2027/28 £</b>	<b>Total Grant</b>
	Social Welfare Information and Advice Service	Social Welfare Information and Advice Service	Social Welfare Information and Advice Service	
<b>Opportunity 1</b>				
Region 1	£1,224,760	£1,224,760	£1,224,760	<b>£3,674,280</b>
Region 2	£1,526,380	£1,526,380	£1,526,380	<b>£4,579,140</b>
Region 3	£1,718,320	£1,718,320	£1,718,320	<b>£5,154,960</b>
Region 4	£1,581,220	£1,581,220	£1,581,220	<b>£4,743,660</b>
Region 5	£1,206,480	£1,206,480	£1,206,480	<b>£3,619,440</b>
Region 6	£1,124,220	£1,124,220	£1,124,220	<b>£3,372,660</b>
<b>Opportunity 2</b>				
Pan-Wales remote service	£3,018,620	£3,018,620	£3,018,620	<b>£9,055,860</b>
<b>Opportunity 3</b>				

Standalone Services – Regional Grant – <i>Please state which region here</i>				
Region 1	£100,000	£100,000	£100,000	<b>£300,000</b>
Region 2	£100,000	£100,000	£100,000	<b>£300,000</b>
Region 3	£100,000	£100,000	£100,000	<b>£300,000</b>
Region 4	£100,000	£100,000	£100,000	<b>£300,000</b>
Region 5	£100,000	£100,000	£100,000	<b>£300,000</b>
Region 6	£100,000	£100,000	£100,000	<b>£300,000</b>

\* Minimum level of funds that must be committed to debt advice as a result of the conditions of the financial services industry levy are set out in the individual tables for Opportunity 1 and Opportunity 2 at point 22 and 31 above.

A Bidder is required to complete the expenditure profile and to provide a detailed breakdown of proposed expenditure in the embedded expenditure spreadsheet. Bidders should include as much information as possible to detail how the grant funding being requested will be used for the provision of the information and advice services in each financial year across the 3 year funding period.

Although some formula has been included in the spreadsheet to assist applicants, it is the Bidder's responsibility to check that all details shown on the spreadsheets are correct. This will particularly be the case where additional lines are added and formulae may need to be adjusted.

Welsh Government encourages a Bidder who is seeking grant funding to offer salaries that meet or exceed the Living Wage. If any salaries within a Bidder's proposal are below the Living Wage, we will be keen to discuss with the Bidder any ways that we can help them to be able to offer salaries that meet or exceed the Living Wage. Further information on the Living Wage is available from <https://www.livingwage.org.uk/>.

### **Important notes**

- a) Whilst Welsh Government is not proposing to specify an expected average total cost per FTE generalist and specialist adviser service, the average total cost per adviser will be an important determinant in assessing whether **i)** the average cost is adequate to give confidence that high quality services are likely to be provided and **ii)** that the average cost is sufficiently competitive to ensure that the social impact of the funded service is maximised.
- b) Average total cost per adviser is calculated by taking the total proposal costs and dividing this by the number of proposed advisers. A Full-time Equivalent (FTE) is considered to work 37 hrs per week. Where this is not the case, applicants should total the number of hours worked by the proposed advisers and divide by 37 to give an FTE figure.

- c) Welsh Government expects as much of this grant as possible to be focussed on frontline delivery. Costs relating to the co-ordination of different services and to consortia as a whole should be kept to the absolute minimum level necessary for effective integrated delivery and reporting.
- d) The Welsh Government will approve the reasonableness of any Management charges/Central costs being requested.
- e) The Welsh Government will not provide a financial contribution towards any redundancy costs.
- f) Where a Bidder is successful in respect of more than one of the grant opportunities available, Welsh Government would expect they are able to clearly demonstrate the cost efficiencies that will be attained by them delivering more than one service. In this event, Welsh Government will have further discussions with Bidders regarding savings that can be made resulting from economies of scale in relation to project management, administration or the technical supervision of staff costs, etc., prior to confirming any grant award.

### ***iii) Outcome Expectations and Monitoring***

A Bidder is required to provide information on the key performance measures that they are proposing to report on and explain how the performance measures will demonstrate to the Welsh Government that the information and advice service they are proposing to deliver will attain the key aims of the Single Advice Fund.

A Bidder will also be required to confirm that, if they receive funding, they will work with the Welsh Government to jointly develop and agree additional performance and outcome measures.

### **Section Seven - General Data Protection Regulations (GDPR).**

All provider(s) must confirm their understanding, acceptance and compliance with, the following conditions:

- I. All awards of grant funding must be compliant with the General Data Protection Regulations (GDPR).
- II. All personal information collected and held by a funded provider will need to be treated in line with the GDPR regulations.
- III. Carrying out the Purposes of this grant will require a funded provider to process personal data on behalf of the Welsh Government.
- IV. The Welsh Government will be the Data Controller and the successful provider(s) will be the data processor.
- V. As a data processor, a provider(s) must only ask for data that is necessary and relevant to the purpose of this project and must only collect data when there is a specific, lawful reason to do so.

In completing Annex A, Bidders will advise which personal data items they will collect in the provision of the proposed service. Where a question arises as to whether any area of proposed collected data is necessary and relevant to the purpose of this project, Welsh Government will discuss this with the Bidder prior to confirming any grant award.

### **Section Eight - Declaration**

In a collaborative application (with delivery involving partners) the 'declaration/certification should be completed by the lead provider.

Anyone signing this declaration should be fully authorised by both their own organisation and, in the case of a collaborative application, by the other partner(s) involved in the bid.

Although copies of partnership agreements between partners in a collaborative bid are not requested as part of this grant application, this declaration confirms that they are in place and available to Welsh Government if requested.

## **APPLICATION ASSESSMENT CRITERIA**

56. The purpose of running this open grant application exercise is to enable the Welsh Government to identify the service delivery models that:

- I. best meets the aim and objectives of the Single Advice Fund, and;
- II. provides the most confidence in terms of high quality service delivery, and;
- III. offers best value for money.

57. There will be an initial assessment of all proposals, and:

- I. a proposal not meeting the requirement for a provider involved in the delivery of social welfare information and advice services to be a holder of a recognised advice Quality Standard (or unable to provide robust evidence that they will be at the date the funded services commence or within 6 months if applying for Opportunity 3, such as confirmation that they have applied for an advice Quality Standard audit) will be rejected.
- II. a proposal where a provider will be delivering debt advice services who is not FCA regulated (or unable to provide robust evidence that they will be at the date the funded services commence) and is not exempted from seeking such regulation will be rejected.
- III. a collaborative proposal, where a non-advice delivering partner will be co-ordinating the funded services and they are not a Not for Profit organisation will be rejected.

58. Incomplete applications will be rejected at the initial assessment stage.

59. The assessment of the responses to the questions in the application form will be based upon a scoring methodology using weighted scoring (as displayed in the table on page 15) with the maximum scores listed for each question to be assessed.

**ADDITIONAL INFORMATION**

**TECHNICAL SUPERVISION**

60. Technical supervisors of the staff engaged in delivering the funded advice services must be experienced social welfare advisers and, in the case of the specialist advice services, a technical supervisor must be an experienced specialist caseworker within the funded subject area being delivered, i.e., welfare benefits, or debt, or housing, etc.

**RECORDS OF ADVICE SESSIONS AND WORK UNDERTAKEN**

61. All the cases funded by the Welsh Government must be evidenced by a comprehensive case record, regardless of whether consent is given for external evaluation (see below). This will include client and third-party interactions, and any work undertaken to progress or review the case.

**REPORTING AND MONITORING INFORMATION**

62. A funded provider will be required to provide the Welsh Government with quarterly monitoring reports on the performance of the funded service, as well as provide compliance checks. The Welsh Government will provide guidance.
63. A funded provider will be required to provide information on the protected characteristics of people accessing the information and advice service. The Welsh Government and the funded provider will agree the information to be provided.
64. A funded provider will be required to provide a copy of their updated risk register to the Welsh Government when requested. Where a new significant risk is identified during the reporting period, this should be reported to the Welsh Government within five working days, or sooner if possible.

**EVALUATION**

65. The Welsh Government is exploring the links between the outputs from the advice services it commissions and longer term outcomes for the people who access these services. A provider receiving Welsh Government Grant funding will be expected to fully engage in this area of developmental work.
66. This exploration of the long-term sustainable outcomes for people who access Welsh Government funded advice services has the potential to include the use



of a third party to evaluate outcomes and/or undertake additional research with individuals who access the funded advice services.

67. The Welsh Government will work with all the providers it funds to establish best practice approaches to promote the benefits of evaluation to service users and encourage their informed consent to evaluation. A funded provider will be required to confirm they (and all the partners within a collaborative service delivery model) consent to participate in this work during the period they are receiving grant funding.

## **MISCELLAENOUS**

68. A Bidder is responsible for obtaining at their own expense advice regarding the possible application of any contingencies; or other circumstances; or matters which might in any way affect their application for grant funding. For example, if an employee of a current recipient of one of the Welsh Government's grant funding streams queries whether their current grant funded employment is covered by the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE).
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**FINANCE GUIDANCE**

69. A funded provider will be asked to confirm the expenditure profiles and provide updates to anticipated expenditure at regular intervals through the grant funding period.

**Claims and Payment**

70. Payment of the grant will be made quarterly in arrears on submission of accurately documented claims in accordance with the provisions that will be set out in the formal grant award letter/conditions. However, payments may be made in advance where a need for this can be clearly demonstrated. If appropriate, providers can request a Payment in Advance template or confirm that one has been submitted for the current financial period if a provider is in receipt of other Welsh Government grant funding.

**Privacy notice: Welsh Government Grants**

71. For information as to how we will handle any personal data you provide in relation to your grant application, please click [Privacy notice: Welsh Government grants](#)
72. The information we have collected from you will be shared with fraud prevention agencies that will use it to prevent fraud and money-laundering and to verify your identity. If fraud is detected, you could be refused certain services, finance or employment in future.
73. Further details of how your information will be used by us and these fraud prevention agencies, and your data protection rights, can be found by contacting; [Data.ProtectionOfficer@gov.wales](mailto:Data.ProtectionOfficer@gov.wales).
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### Definitions of Types of Information and Advice<sup>4</sup>

#### Type One – Information

Describes a service which gives clients the information they need for them to know more and do more about their situation. It can include providing information about policies, rights and practices; and about local and pan-Wales services and services that may be able to offer the client further help. Responsibility for any further action rests with the client.

E.g. a client asks whether he can get help with his council tax. You provide him with a leaflet “Help with Council Tax” and provide details of two local advice services that offer advice on welfare benefits.

#### Type Two - Guidance

Describes a service that may discuss the advantages and disadvantages of different options without making specific recommendations. It may include making and receiving referrals, identifying emergencies and prioritising issues.

E.g. a client wants to understand his finance options before choosing a new or used car. The money adviser explains the features of various purchasing options but does not recommend a particular finance option or provider.

#### Type Three – Advice

Describes services that diagnose the client’s legal problem and any related legal matters; identify options and relevant legislation and decide how it applies to a client’s specific circumstances; includes identifying the implications and consequences of such action and grounds for taking action; includes form filling; provides information on matters relevant to the problem such as advising on next steps and identifying dates by which action must be taken to secure the client’s rights. Advice may take place on more than one occasion.

E.g. a client asks whether she can get help with caring for an elderly neighbour. You carry out a benefit check and identify she may be entitled to claim Carers Allowance depending on her neighbour’s benefits situation. You advise the client to obtain a claim form to protect her potential date of claim and offer details of services that can offer help to the client and her neighbour.

#### Type Four - Advice with casework

Includes all elements of an advice service and also involves taking action on behalf of the client to move the case on. It could include negotiating on behalf of the client with third parties on the telephone, by letter or face to face. It will involve the advice provider taking responsibility for follow-up work.

E.g. a student is having difficulty in negotiating the return of their damage deposit from a local landlord. You contact the landlord and explain that you will be supporting

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<sup>4</sup> As published within the Welsh Government’s Information and Advice Quality Framework for Wales.

the student to recover the maximum value of the deposit. The landlord claims there was damage to the property which the student later accepts. You negotiate a reasonable deduction for the damage.

**Type Five - Specialist casework**

Describes services where the adviser or the service as a whole undertakes advice and casework at a level where very detailed knowledge of the law and case law is required. Usually this means that it is delivered by advisers who have the necessary depth of legal knowledge and expertise to undertake representation for clients through the court or tribunal.

E.g. the client has lost a first tier social security tribunal. Your adviser identifies an error of law in the tribunal's decision that they will go on to argue before the Upper Tribunal. Their arguments will reference legislation and case law.

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