Multiple Sclerosis Society

How to develop a benefits advice partnership

Changes to benefits assessments and eligibility criteria, coupled with increasing economic deprivation have led to higher demand for specialist benefits advice and support.

Our MS helpline takes over 100 calls per month from people concerned about benefits.

The MS Society does not give advice but we want everyone affected by multiple sclerosis (MS) to be able to access this specialist help easily, and when they need to.

Developing a partnership with a local organisation that provides specialist advice is a good way to meet this need. This guide brings together good practice from across the UK and includes information on:

- ✓ **why we need advice partnerships**
- ✓ **planning your advice partnership**
- ✓ **making it happen, step by step**
- ✓ **how you know it's working**

Who is this guide for?

It's for **MS Society branches** interested in developing a benefits advice partnership to support local people affected by MS.

Branches are groups of volunteers that provide local contact, services and support to everyone affected by MS in their geographical area.

Where to find documents signposted in this guide

This guide signposts to a range of more detailed resources. You can find these either:

- on our **volunteer website**, http://volunteers.mssociety.org.uk
- by requesting a printed copy

If you have internet access, please use the website versions as this is not only cheaper, but they will be the most up to date. If you need help finding a particular document either on the MS Society website or in print, call the **Volunteering team**.

Sources of support

Your local staff member - **Area Development Officer (ADO)**, **Local Support Development Officer (LSDO)** or **Service Development Officer (SDO)** - provides the first line of support for branches considering developing an advice partnership. They can help you to identify local demand for advice services, support you in identifying possible partners and ensure all your paperwork is in order. They can also put you in touch with other branches that have advice partnerships, if you'd like to discuss your plans.

Top tip Contact details for staff referred to can be found in **appendix 1 - sources of support**, at the end of this guide. Job titles rather than names are used so that this publication doesn't date when someone leaves their post.

What is an advice partnership and do we need one?

We define an advice partnership as a formal agreement between one or more MS Society branches and an external organisation equipped to provide advice and practical support. Advice partnerships will mainly focus on advice and support relating to benefits, but when other issues are identified they may also offer debt support and will signpost to other appropriate services for issues such as housing, employment and social care.

An advice partnership usually involves an MS Society branch funding a worker to provide specialist advice for an agreed number of hours or days per week or month. This enables people affected by MS to access the support they need quickly and at a location that is accessible to them. A further benefit of providing a service in partnership is that the branch can ensure that the advice service provider has an understanding of MS.

Providing information versus giving advice

Providing information and giving advice are very different things.

The MS Society provides information to support and enable a person to take control and make informed choices for themselves. This means that it is up to the person to decide what works best for them, based on the information available or knowing where to go to find out more.

Giving advice involves a person regarded as knowledgeable or authoritative making recommendations concerning future action. Giving advice is about helping with claims form filling, queries and problems. Giving advice makes a person responsible for the outcome.

The MS Society is not insured to give advice and you must never do so.

Is a partnership needed locally?

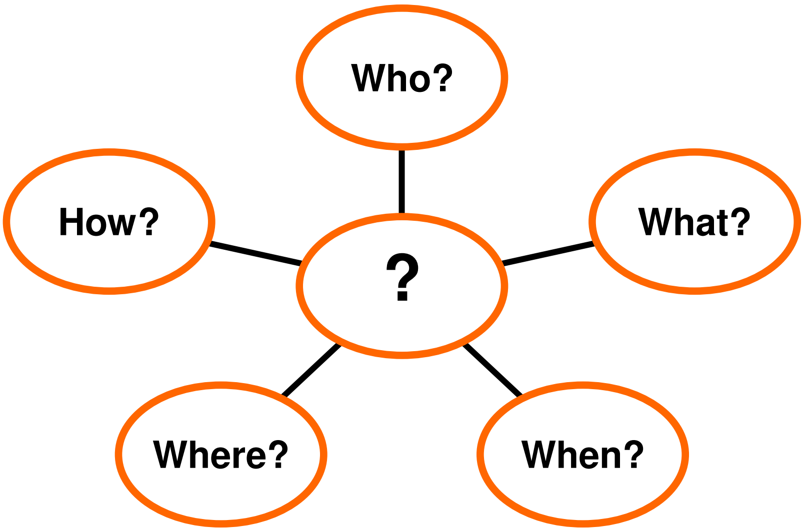
All MS Society branch activities and services should be developed in response to a **need** that has been identified. Before you decide to develop an advice partnership, your committee should gather evidence of what support is required. To do this, you should:

- ask your **local staff** member to confirm how many people are affected by MS in your branch area

- investigate whether there are **existing local services** providing this type of advice and how useful they are to people affected by MS
- talk to your **MS nurse** (if there is one) about what benefits support they provide
- ask your **lead support volunteer** (LSV) how many requests for benefits support or advice the branch receives
- ask other local **providers of support** to people with MS (eg. - MS therapy centres) about how many requests for benefits support or advice they receive

Top tip You can find a tool called **Do we need an advice partnership?** in **appendix 2** of this guide. This will support you to assess whether you need a local partnership.

What your advice partnership could look like



Advice partnerships are like so many other aspects of supporting people affected by MS – one size doesn't fit all. There are a number of things your committee will need to consider.

Who?

Who will benefit?

The MS Society is here for all people affected by MS – members and non-members. Advice partnerships should be set up to support people with MS and their immediate carers in your local area. You will need to consider how to reach out to your local MS community to ensure that they know how to access the service.

Who will you work in partnership with?

There are a number of specialist advice services you could work in partnership with – national groups like Citizens Advice Bureau (CAB), or local organisations who serve a specific geographic area.

We have existing partnerships with both kinds of organisation. Although CABs are individual charities, they have a national structure in place to enable consistent support to be offered throughout England, Scotland and Wales. Don't dismiss smaller, local disability charities though – as specialists in the area of disability, they may have more time and resources to develop an advice partnership with us.

In order to ensure that high quality, up to date advice is being provided to people using the service, you should look to develop a partnership with an organisation that is recognised as an advice provider who can provide training and support to their staff. In some areas however, there may not be an advice organisation operating and so an alternative option may need to be considered. If you think this is the situation in your area, please contact your local member of staff for advice.

Top tip **Disability Information and Advice Line (DIAL)** services are run by and for disabled people. Your local DIAL service may be able to recommend an advice organisation to approach. See http://www.scope.org.uk/dial for more information.

Some advice partnerships involve more than one branch. This works well where an advice organisation covers more than one branch area. Working with neighbouring branches also helps split the cost of the partnership and increases the number of people who can benefit.

What?

What will your advice partnership do?

We set up advice partnerships primarily to enable people with MS and their immediate carers to access one-to-one support and advice on benefits.

Where a need for debt advice can be evidenced in a local area, partnerships may also provide this. You will need to speak to your partner organisation about their current waiting lists for debt advice in order to decide if this is something your partnership should focus on. Your partner organisation should also provide signposting or referral to other services such as employment support, housing, social care assessment.

Advice partnership workers can also occasionally speak at branch information events, enabling the wider MS community to learn about what they might be entitled to and the support available.

What information will you provide?

The fluctuating nature of MS and its hidden symptoms make it difficult to explain the real impact of MS on a person’s daily life and their ability to do things repeatedly, reliably, safely and in a timely way. It is vital that any advice worker we engage has an understanding of not just the symptoms of MS, but also how they impact on a person. It is therefore important that you are able to provide your partner organisation with information about MS and its impact.

Top tip You'll find a presentation and accompanying guidance notes on the **volunteer website,** http://volunteers.mssociety.org.uk to help you explain the nature of MS to your partner organisation.

When?

When will your adviser be available for appointments?

Advice partnerships involve an MS Society branch funding a worker to provide specialist advice for an agreed number of hours or days per week or month. The number of hours or days your branch funds will depend on:

- the level of need identified
- the size of the area your branch covers
- your funding options

Where?

Where will your adviser see clients?

Some advice workers hold joint drop-ins with the local MS nurse. Others work out of an advice centre or office, and see clients there. If your branch has a property, it may be appropriate for clients to go there for appointments, or you could look for an accessible community space.

Some advice workers also make home visits. This can make the service accessible to people who find leaving their homes difficult. Depending on the issue, it can also be easier to support clients in their home environment – the advice worker might notice things that could help a client's case that they wouldn't otherwise think to mention. However, home visits take up much more time than when people can come to the advice worker. Home visits should be reserved for those who genuinely cannot attend other centres to ensure that the advice worker can see the maximum number of clients possible.

Top tip If you want your advice worker to hold sessions at a location of your choosing, you will need to ensure it is **accessible.** You can find an **access audit** template and guidance on our **volunteer website**, http://volunteers.mssociety.org.uk.

How?

How will people access your service?

Accessibility isn't only about whether a building has a lift or adequate parking. A number of other factors can determine whether people feel able to access a service:

- opening hours - can people be seen out-of-hours?
- what else happens there - GP services, MS info point, MS nurse drop-in
- does your branch provide transport?
- whether there is a drop-in or appointment system
- if they're worried they might see someone they know

The MS Society is here for all people affected by MS – both members and non-members. For your advice partnership to be accessible to all, you'll need to think about the **barriers** that can prevent people from asking for help.

Referral and self-referral

It's not the role of the branch committee to decide who can use the service – your advice worker will assess what support a person needs. Your role is to publicise the advice partnership as widely as possible to people affected by MS to ensure people know how to access it.

Top tip See **raising awareness** on page 16 for ideas and suggestions for how to promote your advice partnership.

MS support volunteers, your local MS nurse and partner organisation may refer people to the service, but people should also be able to self-refer if they want to. Many advice partnerships set up a **dedicated email address and phone line** to deal with enquiries about the service.

How to make it happen

Step by step

Resources
How much will it cost?
How will you fund it?
Who needs to be involved?

Approach
Contact your preferred partner
Your service level agreement

Creating awareness
Promoting your partnership
Planning your launch

Monitor and review
Steering group meetings
Annual committee review
If something goes wrong

Resources to consider

What you pay for an advice worker isn't the only resource you need to consider. You and your volunteers' time and effort also need to be factored into your planning process.

How much will it cost?

A number of factors will affect how much your advice partnership will cost to run:

Level of demand

All MS Society branch activities and services should be developed in response to a **need** that has been identified. Before you decide to develop an advice partnership, your committee should gather evidence of what support is required.

Top tip The information you gathered to complete **Do we need an advice partnership? (appendix 2)** will have given you an idea of the likely demand for your service.

Number of appointments

If your adviser sees clients at their office, they are likely to make no more than three appointments during an eight hour working day. This is because each hour-long appointment will usually generate at least the same again in follow-up work. An eight hour day also includes a lunch hour and most services run for 46 weeks of the year to allow for annual leave and statutory holidays.

Home visits

Visiting clients at home or working out of a number of locations can help make your service accessible to more people, but your adviser won't be able to make as many appointments. Many partnerships agree a maximum number of home visits per week or month to balance accessibility and demand for appointments.

Chargeable rate

You will need to agree how to calculate the cost of your advice partnership. You may agree to pay a **cost per hour** up to a maximum number of hours per week or month, or a **weekly or monthly rate** for an agreed number of hours or days. As a guide, our existing advice partnerships cost **£20 - £30 per hour**.

How will you fund it?

Before setting up a partnership, you should ensure your branch has at least **two years full running costs** available. This is because it takes about 6 months to get the service properly up and running, address any teething problems and promote it widely.

Your branch committee will also need to develop a **fundraising plan** to meet the costs of your advice partnership for subsequent years.

Top tip Find out more on developing a fundraising plan on our **volunteer website,** http://volunteers.mssociety.org.uk/fundraising-campaigning/fundraising/effective-approaches. You can also talk to your local member of staff or **Area Fundraiser**.

Who needs to be involved?

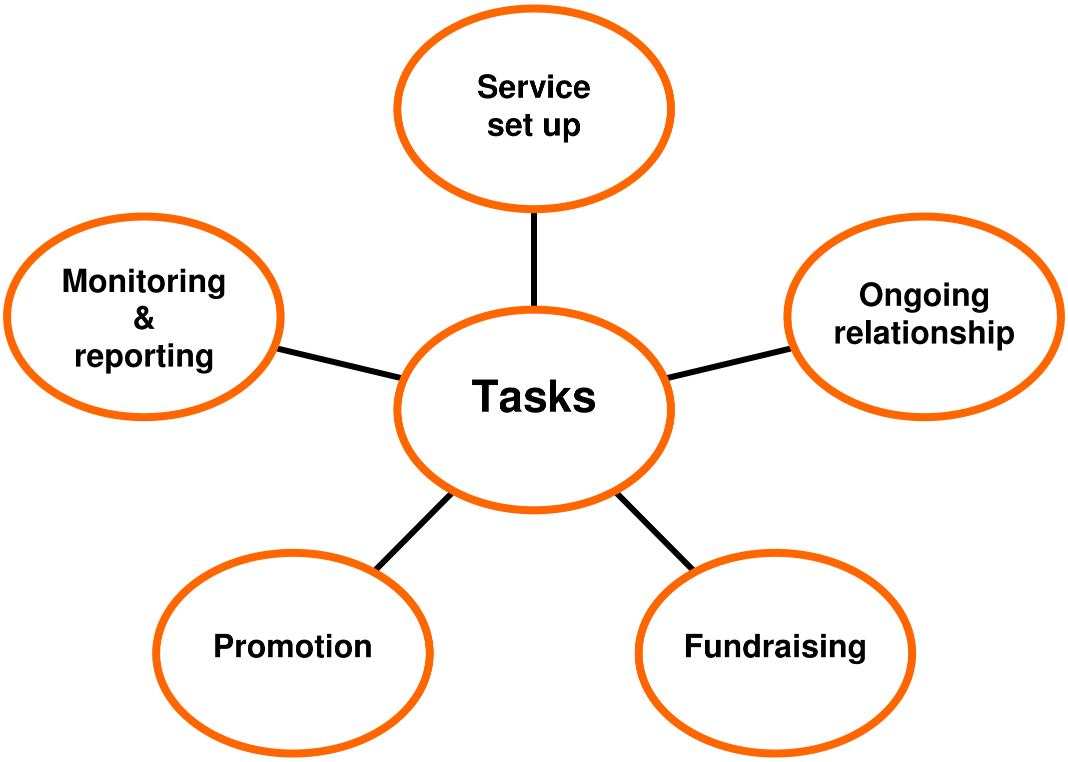
Committee responsibility

You are all responsible as a **committee** for any service your branch provides, with the **chair** having overall responsibility. Once a year, your committee will need to meet to review your advice partnership.

Your **treasurer** is responsible for dealing with invoices and regularly reporting finance information to the rest of the committee.

Project roles

A number of roles and tasks need to be fulfilled to run a successful advice partnership, but how you allocate them is up to you. Your **support team** may fulfil each of the necessary roles, or you might have one volunteer with the skills and time to lead the project.



Named contact(s)

You should nominate a specific named contact for your partnership. They need to be a member of your committee or someone in your support team. Their role is to be the first point of contact for the service provider if there are any issues. You should also nominate a secondary contact in case your named contact leaves or is unable to fulfil their role.

Steering group

The purpose of a steering group is to decide on the priorities of a project and manage the general course of its operations. You will need to set up a steering group to monitor the success of your advice partnership and to report regularly to the committee. Steering groups should meet quarterly in the first year of the project and at least six monthly after that. A steering group may involve the following people:

- Named contact(s)
- Lead support volunteer (LSV)
- Advice partnership worker
- Advice partnership manager
- Health professional
- Local staff member (ADO, LSDO or SDO) (if necessary)

Top tip You can find an **example steering group terms of reference** in **appendix 3** at the back of this guide.

Local staff

Your local staff member provides the first line of support for branches considering developing an advice partnership. They can help you to identify local demand for advice services and can support you through the process of approaching a partner and setting up your partnership. They can also put you in touch with other branches that have advice partnerships, if you'd like to discuss your plans.

How to approach your preferred partner

Before you decide to develop an advice partnership, your committee should gather evidence of what support is required. During the course of this, you should speak to local specialist advice organisations to establish what they provide and whether people affected by MS are able to access the support they need.

Write a letter of introduction

Once you have established that you have the resources to set up and sustain an advice partnership, you should write to your preferred advice partner to introduce the MS Society and your branch.

Close your letter by asking for a meeting to discuss service provision and request a copy of their latest annual report and accounts.

Meet in person

The purpose of this meeting is to discuss the issues facing both organisations and to establish whether you can work together to meet the local need you have identified. You might not need to offer to pay for a specialist MS adviser - it may be that they have capacity and want us to help promote their service.

Preparing before your meeting is important – make sure you have copies of all the facts, publications and documents you will want to refer to. You can also take a list of what you want to talk about to ensure you make the most of the meeting.

If you'd prefer, you can ask your local staff member to attend the meeting with you.

Top tip You can find a **template letter of introduction** and a list of **suggested questions** to guide your negotiation in **appendices 4 and 5** at the back of this guide.

What is a service level agreement?

A service level agreement (SLA) sets out the specifics of the service to be provided and the roles and responsibilities of all parties involved in the partnership. It is a legal document that will support you to monitor the service and ensure that it is delivering in line with your expectations. It is important to note however that there is provision to change the agreement or end it if there is reason to.

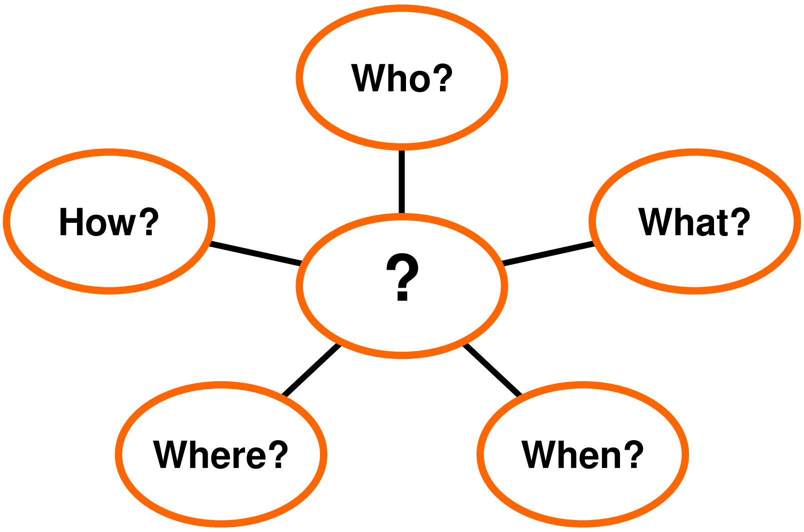
Top tip You can find our **template SLA** for advice partnerships in **appendix 6**. The first section of this sets out the terms and conditions standard for all partnerships and cannot be varied. The **service level schedule** (the other section) can be adapted for specific partnerships depending on local need and circumstances.

Your local member of staff will support you in discussing and agreeing the SLA with the partner organisation.

Raising awareness

How to promote the service

The success of your advice partnership will depend on how well you promote it on an ongoing basis.



You will need to develop a **communications plan** to ensure that the service is promoted as widely as possible and that people know how to access it.

Your communications plan will set out:

- **Who you are going to target** - people with MS, their families and carers, MS nurses and other professionals
- **What you're going to tell them** - what's on offer, how to access it, contact details, case studies of people who have used the service
- **When you'll tell them** - a regular drip-feed of information helps ensure people know about the service when they need it
- **Where you'll promote the service** - branch newsletters, web pages, information events and annual meeting, local media, social media, MS info points, MS therapy centres, GP surgeries, libraries and community centres
- **How you'll promote the service** - dedicated phone number and email address, articles, advertisements, presentations, press releases, posters, flyers and leaflets

Top tip You can find an example **communications plan** in **appendix 7** at the back of this guide.

How is it going?

How to monitor your advice partnership

To ensure that your partnership is delivering the service you expected it to you will need to monitor service **information** and **outcomes**. We have developed a standard monitoring form to help you to do this.

It is your partner organisation's responsibility to collect the information on this form and provide it to you quarterly. As well as helping you to monitor how your partnership is working, we also collate this information nationally to help us understand the impact of partnerships on people's wellbeing.

Monitoring form

When you are developing your partnership, your local member of staff will provide you with a copy of the standard monitoring form. You should discuss this with your partner organisation when agreeing the SLA as this will require them to collect this information and provide it to you in this format quarterly.

The monitoring form includes **information** about how many people were supported during that quarter, what issues they were supported with and how they heard about the service. It also includes details of the **outcomes** of the service they have received, such as whether it has resulted in a successful benefits claim or helped them reduce or manage their debts.

There is also information about the number of hours of service provided, where appointments have taken place, and waiting times. This will allow you to check that the service is being delivered as agreed in your SLA.

Finally, the monitoring form also requires your partner to provide at least one **case study** each quarter which will demonstrate the value of the service. This will give you a clearer picture of what impact the service is having on people's wellbeing and will support our campaigning activity.

Once you have agreed your SLA, MS National Centre will provide you with a monitoring form tailored to your partnership. This will include specific information that will support you to monitor your project.

Steering group meetings

One of the roles of your steering group will be to review the monitoring information and evaluate the service. This will ensure that any issues relating to the service are identified and discussed in a timely way.

This is the process for monitoring your partnership quarterly:

Task	Responsibility
Complete the monitoring form	Partnership organisation
Send completed monitoring form to: • Branch named contacts • Local member of staff • Advice partnership monitoring at MSNC - advicepartnershipmonitoring@mssociety.org.uk	Partnership organisation
Check and review the information on the form	Branch named contacts/ steering group
Raise and discuss any issues, concerns or queries with your partner organisation	Branch named contacts/ steering group

Annual review

Your committee should review the partnership at least annually. This review should be based on the monitoring information provided and the steering group's recommendations. It is the committee's role to decide whether the service is beneficial and cost effective and whether any changes to the service are needed.

Why share this information?

We ask partnerships to share their monitoring information so that it can be collated nationally for a number of reasons. It can help us to:

- **establish** future MS Society priorities
- **share** good practice and improve our activities
- **demonstrate** to health and social care professionals or potential funding sources how you support your local MS community
- **inspire** other branches and groups by sharing details of successful partnerships nationally

We may from time to time request specific information or case studies from your advice partnership to support us with a national campaign or piece of work.

What if something goes wrong?

Reviewing the monitoring information provided quarterly by your partner organisation will enable your committee to quickly spot any concerns about the service being delivered and address them through discussion at the steering group meetings. Your local staff member can help you deal with any problems or concerns identified through the monitoring information. **It is your responsibility as a committee to act quickly to address issues, and you must keep staff informed.**

Most concerns will be addressed through discussion with the partner agency. Your SLA should however include the notice to be provided by each partner to terminate the agreement and the process for doing so, in case an irresolvable issue arises. For example, if your advisor needs to go on long term sick leave and your partner organisation can't provide a replacement.

How to deal with complaints

You may need to deal with an occasional complaint from someone who has used the service. How you handle this will depend upon the nature of the complaint.

If a service user is unhappy with the quality of the advice they have received, the complaint should be handled through your partner organisation's complaints procedure, and you should be informed of the outcome.

If a complaint is received about someone's ability to access the service, or the quality of the service they have received, this should be handled by the branch lead person. It may be appropriate to take a complaint like this to the steering group, but if the complaint is about an individual, it may need to be handled outside of this meeting. You should seek advice from your local member of staff about how best to handle these types of complaints.

All complaints should be logged by the committee so that you can spot any trends and adapt the service where appropriate.

Appendix 1 - Sources of support

Our volunteer website

Whatever you do as an MS Society volunteer, you'll find the latest news and information to help you carry out your role on our **volunteer website**, http://volunteers.mssociety.org.uk.

Here are some key resources that can help you develop your advice partnership:

Offering support section
http://volunteers.mssociety.org.uk/offering-support-people-affected-ms

Making it work – committee handbook
http://volunteers.mssociety.org.uk/making-it-work-committee-handbook

Treasurers' handbook
http://volunteers.mssociety.org.uk/treasurers-handbook

Benefits and MS – a How to guide
http://volunteers.mssociety.org.uk/resources/623

"A lottery of treatment and care: MS services across the UK"
http://mslottery.mssociety.org.uk/

Your local staff member

Your local staff member can help you to achieve your essential requirements for supporting people affected by MS. If you need contact details for your local staff member, please contact the following people:

Volunteering (England and Wales)
volunteering@mssociety.org.uk
Tel: 020 8438 0944

Development Team (Northern Ireland)
NIDevelopmentTeam@mssociety.org.uk
Tel: 02890 802 802

Volunteering Development Manager (Scotland)
vdm@mssocietyscotland.org.uk
Tel: 0131 335 4074

Other useful contacts

Advice partnership monitoring
advicepartnershipmonitoring@mssociety.org.uk

Communications team
comms@mssociety.org.uk
Tel: 020 8438 0741

Finance team
financesupport@mssociety.org.uk
Tel: 020 8438 0785

Information team
information@mssociety.org.uk
Tel: 020 8438 0799

Information team (Scotland)
information-scotland@mssociety.org.uk
Tel: 0131 335 4050

Marketing team
marketing@mssociety.org.uk
Tel: 020 8438 0700

Membership team
membership@mssociety.org.uk
Tel: 020 8438 0759

Print buyer
comms@mssociety.org.uk
Tel: 020 8438 0731

The MS Helpline

The MS Helpline offers emotional support and information to anyone affected by MS in the UK. You should give the helpline contact details to anyone you think could benefit:

- Freephone helpline: **0808 800 8000**
- Helpline email service: helpline@mssociety.org.uk

Appendix 2 - Do we need an advice partnership?

Investigate and answer the following questions to help decide whether an advice partnership is needed locally. Keep it safe to refer back to when reviewing whether your partnership is successful.

Question	Comments
What is the estimated number of people with MS in the branch area?	
Are there any local service providers giving specialist benefits, advice to people affected by MS?	
If yes, are people affected by MS able to access the service? What is the average waiting time to get an appointment? Are there any issues with the service they provide?	
Does the local MS/neurological nurse support people with benefits claims?	
If yes, how many do they deal with in an average month?	
How many requests for benefits, debt or employment advice or support has the branch received in the last 6 months?	

Appendix 3 - Example steering group terms of reference

Use this terms of reference (ToR) example to agree the purpose of your steering group, who is involved, who the group is accountable to, what your objectives are and how often you'll meet.

Title

<MS Society branch> and <partner organisation> advice partnership steering group

Purpose

To monitor the delivery of the advice partnership project in line with the agreed service specification and monitoring information provided.

Service information:

- The number of people supported
- The number of hours provided
- The average time someone has to wait before securing an appointment
- The current waiting list

Referral and signposting information:

- The sources of referrals
- The number of people signposted to other services, what these services are and where possible what the outcome was

Service outcomes:

- The amount of benefits secured by people accessing the service
- The amount of debt avoided by people accessing the service (where appropriate)
- Case studies

Measures of satisfaction and service quality

Role of the steering group

- Agree and review steering group membership and terms of reference
- Agree and review communications plan
- Review monitoring statistics and produce a quarterly report for the MS Society and advice partner committees

Membership

- Lead support volunteer, MS Society branch
- Local staff member, MS Society (where appropriate)
- Advice organisation manager
- Advice organisation caseworker
- Health professional

Accountability

The steering group will report to:

- MS Society branch
- Advice organisation board of trustees

Frequency and administration of meetings

The steering group will meet a minimum of four times per year.

Review date

Annually

Appendix 4 - Example letter to a potential partner

Dear……

I am writing on behalf of the (INSERT BRANCH NAME) branch of the MS Society of which I am branch (INSERT YOUR ROLE).

The MS Society and its local branches exist to support people affected by MS throughout the UK. Our branch has been supporting people in (INSERT INFORMATION HERE ABOUT THE AREA YOUR BRANCH COVERS AND HOW LONG YOUR BRANCH HAS BEEN RUNNING).

We are aware through feedback from our members of the difficulties faced by people affected by MS when trying to access benefits advice. (PROVIDE MORE SPECIFIC INFORMATION HERE ABOUT ANY FEEDBACK YOU HAVE HAD FROM BRANCH MEMBERS/MS PROFESSIONALS) We would therefore be interested in meeting with you to discuss how we might work together to improve access to local advice services for people affected by MS.

I would be grateful if you could contact me on the number below to arrange a suitable time to meet. I can bring along further information about our branch and the people we support and how branches have worked in partnership with advice giving organisations in other areas to improve access to services for people affected by MS. I would also grateful if you could provide me with a copy of your annual report.

I look forward to hearing from you.

Yours sincerely,

YOUR NAME
YOUR BRANCH ROLE
For and on behalf of the (INSERT BRANCH NAME) MS Society branch.

Top tip Make sure you send your letter on up to date **MS Society headed paper**. Download our headed paper **template** on the **volunteer website** http://volunteers.mssociety.org.uk/resources/840 or order it in 500 sheet packs from our **online shop**.

Appendix 5 - Suggested meeting framework

The purpose of this meeting is to discuss the issues facing both organisations and to establish whether you can work together to meet the local need you have identified.

Current service provision

Ask about:

- ✓ current waiting times and capacity
- ✓ geographical area covered (is it the same as your branch?)
- ✓ other local advice organisations
- ✓ whether advisers are paid or voluntary
- ✓ what their understanding of MS is

MS community

Tell them about:

- ✓ the fluctuating nature of MS and how it can make benefit claims difficult, impact on a person's employability, etc.
- ✓ how many people we estimate to have MS in the branch area (not your membership)
- ✓ local issues (your LSV can help)

Support

Take copy of What is MS? and branch newsletter

Discuss:

- ✓ the support we offer to people affected by MS, locally and nationally
- ✓ the support they can give us – speaking at information events, home visits, etc.

Partnership

Take the MS Society template service level agreement (SLA) and an example of a flyer

Discuss:

- ✓ how advice partnerships work elsewhere
- ✓ benefits of positive publicity to both organisations
- ✓ whether an advice partnership could work locally
- ✓ whether they would like to be put in touch with an organisation already working with us

Appendix 6 – Template service level agreement (SLA)

Service level agreement: Advice Partnerships

This agreement sets out the standard terms and conditions for benefits advice partnerships between the MS Society and benefits advice agencies.

Service commissioner	Name of branch (on behalf of the MS Society)
Service provider	Name of benefits advice service
Type of service	Specialist benefits advice service for people with multiple sclerosis (MS) and their immediate carers
Geographic area	
Service duration	Length of agreement
Start and finish date	
Review and reporting frequency	
Steering group	The steering group will comprise: • Two officers of the ……….Branch of the MS Society. • The benefits adviser responsible for the service provision under this agreement • A member of the MS Society area team staff, where possible

Terms

The responsibilities of each party will be as follows:

The Service Provider will:

1. Provide a benefits advice service to people affected by MS and their immediate carers in accordance with the Service Level Schedule.

2. Be responsible for all aspects of running and managing the steering group including:
   - calling of quarterly meetings

- circulating papers relating to the meeting at least 7 days before the meeting date
- taking minutes of meetings and circulating them within 7 days of the meeting
- providing suitable premises in which the meetings will take place

3. Provide the MS Society with quarterly monitoring and evaluation information relating to the service as set out in the monitoring and evaluation section of the Service Level Schedule.

4. No person with MS or their immediate carers will be refused access to or given lower priority for the Service Provider’s services under their normal channels or referral methods due to the existence of this agreement.

The MS Society will:

1. Provide two named branch contacts with whom the Service Provider will liaise over all aspects of the service.

2. Attend quarterly monitoring and review meetings called by the Service Provider.

3. Respond to all requests from the Service Provider within 14 days.

Joint responsibilities:

1. Both organisations will work together to fully promote the service to all people with MS and their immediate carers within the agreed geographic location as specified in the service level agreement.

2. 6 months prior to the agreement termination date both parties will meet to discuss the option of renewing this agreement.

Professional standards:

The Service Provider is legally and professionally accountable and responsible for all aspects of work, for ensuring a high standard of care and for maintaining competence through continued professional development and reflection.

Provision of service:

The service is provided by the Service Provider (not the MS Society) and is funded by the MS Society.

The Service Provider will:

1. Use personnel who are suitably skilled and experienced to provide the service.

2. Perform the service with the best care, skill and diligence in accordance with best practice for benefits advice services.

3. Ensure at all times that the service provided is in accordance with the service specification.

4. Maintain complete and accurate records of all work undertaken as part of this service.

5. Ensure that all client details are kept safely and securely and that all data protection issues are observed.

6. Ensure all casework conforms to relevant statutory requirements effective at the time.

Cost of service:

The cost of the service as detailed in the Service Schedule shall be the full and exclusive remuneration in respect of the service including any and all taxes that might be payable.

Payment for services:

The MS Society will pay all correct invoices which are accepted by the Society as meeting the requirements of section 4 of the Service Schedule within 28 days of receipt.

Anti-discrimination:

The Service Provider shall not unlawfully discriminate within the meaning and scope of any law, enactment, order, or regulation relating to discrimination (whether in race, gender, religion, disability, sexual orientation or otherwise) in employment or the services they deliver.

Indemnity and insurance:

The Service Provider shall keep recognised insurance to ensure that the Society is indemnified in full against all costs, expenses, damages and losses (whether direct or indirect) including any fines, legal and other professional fees and expenses awarded against or incurred or paid as a result or in connection with services provided under this agreement. Evidence of insurance will be provided by the Service Provider to the MS Society upon request.

Data protection:

Where the service provider processes any personal data (as defined by the Data Protection Act 1998 (the Act)) which it has received from the MS Society or from or behalf of any individual to whom it is providing advice as a result of this benefits advice service, it shall ensure that it:

(a) fully complies with the Act
(b) takes all technical and organisational security measures necessary to prevent unauthorised or unlawful processing of personal data and to avoid accidental loss of, destruction of, or damage to the personal data
(c) only processes the data in accordance with instructions given by either the MS Society or the individual and only to the extent that it is necessary to fulfil its obligations under this agreement or to the individual
(d) has taken all necessary steps to ensure the reliability of all its employees who may be involved in processing the personal data

The Service Provider shall allow the MS Society reasonable access to such information as is necessary to ensure that it is complying with this provision and the Act as a whole.

The Service Provider shall indemnify the MS Society against any liability, loss, cost, claim or expense incurred as a result of any breach of this Act or this provision by the Service Provider.

Variation of contract:

No variation to this agreement can be made without the mutual written agreement of both parties.

Termination of contract:

This contract can be terminated at any time by either party by giving 3 months written notice of intention to terminate for convenience or without notice if the other party is in material breach of the agreement. Pro rata payment will be made for any period not invoiced prior to early termination.

Sub-contracting:

No subcontracting of this service will be allowed without the express written permission of the MS Society.

Disputes:

Complaints about the service from clients:

All complaints about the service received from the Service Provider will initially be dealt with via the Service Provider’s complaints procedure. Full records must be kept of all complaints, investigations and outcomes. A summary of all complaints, investigations and outcomes must be provided by the Service Provider to the MS Society at the quarterly meetings.

Service Level Schedule

1. Level of service	• Provide a benefits advice service to clients affected by MS and their immediate carers. • Assist clients, where necessary, in respect of all aspects of benefits claims including drafting letters, completing application forms and assisting in the collation of supporting documentation. • Maximise the income of people affected by MS and their immediate carers by providing information, advice and support to enable individuals to claim all benefits they are entitled to. • Prepare cases and represent clients to the appropriate statutory bodies, tribunals and courts as required. • *Financial and debt advice where this is required by the client and is not able to be provided by the existing CAB debt advice service* (delete where this service is not part of the SLA). • Signpost and refer clients to other services including debt advice, employment support, housing support and social care assessment support where required. • Liaise and work jointly with local MS Society volunteers and staff, other statutory bodies and voluntary organisations as appropriate. • Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service.
2. Service delivery	**The Service Provider will provide the service by either:** • appointing a suitably qualified benefits advisor or • assigning the project to an existing benefits advisor (delete as appropriate)
3. Terms of service	• The service will be for x hours per annum (including all travel time, face to face client time,

	administration time and supervision time). • The service will be available 46 weeks of the year. • The Service Provider will be expected to provide cover for sick leave, maternity leave, paternity leave and other absences by the dedicated worker. • The benefits advisor will be employed directly by the Service Provider and the Service Provider will be wholly responsible for all aspects of employment.
4. Costs	• The MS Society will pay a cost of £x per annum to the Service Provider This will be paid quarterly in arrears on provision of a detailed invoice and the monitoring data from the Service Provider as detailed in appendix 1 to this document
5. Breakdown of responsibilities	**Service Provider responsibilities:** • All human resource issues including invoicing, supervision and support, training and professional development, adequate indemnity insurance, DBS checks. • All client records to be kept up to date and in a safe and secure environment. • Attendance at quarterly meetings to review the service and share information. • Attendance at additional meetings if required by the MS Society to discuss any problems with the service or the non provision of service. • Notification of any relevant incident/accident within 24 hours to named branch contact. • Arranging and servicing all quarterly steering group meetings. • By mutual agreement and with sufficient notice given by the Service Commissioner be prepared to deliver information at local MS Society information events

	Branch responsibilities: • Attendance at quarterly (or as required) meetings to review and share information. • Paying accepted quarterly invoices on time. • Ensuring the Service Provider is informed of any changes to the branch representation for the steering group. **Joint responsibilities:** • Service development and planning in relation to proposed changes to this specific service or to data collected. • Establishing a steering group to oversee the project consisting (as a minimum): o 2 branch representatives o member of area staff team where possible o benefits advisor responsible for the project.
6. Referrals to service	This service is open to all people affected by MS and their immediate carers. **Referrals to the service will be accepted from:** • MS Society branch • Health professionals • Social Services • Self referral **Joint responsibilities:** Both parties will publicise the service as widely as possible including (but not exclusively): • Branch newsletters • Branch website • MS Professionals • Posters and publicity material as appropriate • Any relevant CAB publications • Local conferences and information days

7. Quality	**Service Provider responsibilities:** • To ensure caseworker keeps up to date with any necessary training and development needs. • To ensure caseworker has access to appropriate educational materials. • To ensure client confidentiality is observed. • To use quarterly feedback to identify any problems and propose appropriate solutions. **Branch responsibilities:** • To respond to all reasonable requests for support and guidance from the service provider. • To ensure the caseworker is made aware of any MS Society changes or developments which may affect the caseworker.
8. Objectives and outcomes	• People affected by MS and their immediate carers are supported to maximise their income through advice and practical support to ensure they know and can act on their entitlements. • The service is delivered in appropriate premises. • The service provider will provide evidenced achievement against objective outcome and evaluation measures as detailed in section 9. • Either: o a minimum of X hrs of face to face contact with clients will be provided per 12 months or o a minimum of X number of clients will be seen per 12 months.
9. Review and monitoring of the Service	**The Service Provider will:** • Provide quarterly statistics and monitoring reports to the branch and to the designated email address as stated on the attached data monitoring report form.

	• Attend quarterly review meetings, along with MS Society branch volunteers and staff, where appropriate. • Provide an annual evaluation report.

For and on behalf of the MS Society:

Signature: ____

Title: ____

Address: ____

Phone: ____

Date: ____

For and on behalf of provider:

Signature: ____

Title: ____

Address: ____

Phone: ____

Date: ____

Appendix 7 - Communications plan

This is an example plan to give you ideas. You will need to tailor it to your branch area and the communications channels available to you.

Objective

The objective of your communications plan is to promote your advice partnership as widely as possible to ensure that local people with MS and their carers know that it exists and how to access it. You will need to think about:

- **Who do you want to communicate with** - people with MS, their families and carers, MS nurses and other professionals
- **What do you want to communicate** - what's on offer, how to access it, contact details, case studies of people who have used the service
- **When do you want to communicate** - a regular drip-feed of information helps ensure people know about the service when they need it
- **Where can you promote the service** - branch newsletters, web pages, information events and annual meeting, local media, social media, MS info points, MS therapy centres, GP surgeries, libraries and community centres
- **How can you promote the service** - dedicated phone number and email address, articles, advertisements, presentations, press releases, posters, flyers and leaflets

Who and what

This table will help you to think about the audience for your communications and the message you want to communicate:

Audience	**Messages**
Internal	
Branch and committee members	• that the service has been set up and what it provides • the service details and costs and any implications for branch finances and fundraising • how to access the service • their role in promoting the service
Involved	
Your partnership organisation	• that the service has been set up and what it provides • who the service is for • how to access the service • their role in promoting the service

Local MS professionals	• that the service has been set up and what it provides • who the service is for • how to access the service • their role in promoting the service
Other services or individuals your branch has partnerships with	• that the service has been set up and what it provides • who the service is for • how to access the service • their role in promoting the service
External	
Other services likely to be accessed by people affected by MS, such as social services, GPs, carers services, MS therapy centres and leisure services	• that the service has been set up and what it provides • who the service is for • how to access the service • their role in promoting the service
People with MS, their carers and families	• that the service has been set up and what it provides • who the service is for • how to access the service

When and where

Getting your message out there needn't be expensive. It is important to think about what **communication channels** are already in place so you can ensure that these are used effectively to promote your service. For example:

- your branch newsletter
- your **near me** pages on the MS Society website www.mssociety.org.uk/near-me
- committee and annual meetings
- branch socials and other opportunities where branch members and people affected by MS get together

Your partner also has responsibility for promoting the service and will have its own communication channels which can be used.

You will also want to consider whether you need to develop specific **communication materials** or use communication channels you have not used previously. For example, you may want to develop specific service **fliers and posters**. You will then need to consider **where** to use these and **who** to give them to ensure that all people affected by MS, and not just branch members, see them. You may give supplies to:

- MS Nurse
- GP surgeries
- libraries
- leisure centres

Timeline

Once you've thought through the tactics and channels you wish to use, it is useful to set out your plan into a simple timeline showing when activity will happen, what key deadlines exist and who will be responsible for each element.

Remember that some of the same channels will reach different audiences.

Timing	**Audience**	**Message**	**Channel**	**Who**