

How-to Guide

This guide offers more detailed information and advice for those who may be interested in adopting or adapting the initiative in their local area.

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Social Needs Screening Tool



Title	Social Needs Screening Tool
Organisation	Perth and Kinross Council
Category	Promising Local Practice.
Poverty Impact	Reduction. Awareness.
Introduction to the Project	
<p>The objective of Perth and Kinross Council’s Social Needs Screening Tool is to identify and overcome unmet needs in the area. The Tool has been rolled out to frontline workers to help them identify the challenges parents of children in early years education are facing and refer them to support. The Tool involves questions co-produced with parents with lived experience of poverty, specifically related to food insecurity, housing instability, utility needs, financial resource strain, employment and exposure to violence. It provides increased detail about unmet needs in localities and schools whilst guiding frontline workers with referrals to specific support services.</p>	

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Initial Idea

Who had the initial idea?			
Perth and Kinross Council.			
How did the idea for the project come about?			
Frontline workers had expressed difficulties about conversations with parents about financial challenges. They also identified that there was stigma around these conversations. The Tool was developed to overcome these challenges and to provide concrete support to parents and children with unmet needs.			
Were plans informed by any published reports / papers / research evidence or practice from elsewhere?			
Social needs screening occurs widely in healthcare settings in the United States and Canada but is not used in education settings. Perth and Kinross Council decided to adapt social needs screening to identify particular challenges that parents with children in early years education face.			
Was anyone else involved in developing the initial idea of the project?			
Parents with lived experience of poverty helped develop and tweak the questions in the questionnaire, ensuring they were sensitive to the obstacles parents with children in early years education face.			
Were those with lived experience of poverty involved in developing the initial idea of the project?			
Yes. Approximately 60 parents with lived experience of poverty were involved in developing the questionnaire for parents. Parents were integral to the adaptation of the questions. They guided the Council by ensuring the questions were appropriate, not offensive and sensitive to the challenges many parents face.			
Was funding required to support the development of the initial idea of the project?			
No	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>

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Please provide details of the funding that was used to support the development of the initial idea of the project.			
Which organisation provided funding?		Perth and Kinross Council.	
How much was required?		£12,000.	
What was the specific source of funding?		Scottish Government Child Poverty Accelerator Funding	
Were specific resources – other than funding - needed when developing the initial idea of the project?			
No		Yes	
		✓	
Please provide details of the resources that were required when developing the initial idea of the project. <i>If not needed, please add N/A</i>			
Staff/Volunteer Time	Parents with lived experience and frontline workers supported the development of the questionnaire, ensuring it was relevant and appropriate.		
Facilities / Workspace	N/A		
Equipment	N/A		
Local Knowledge	Frontline workers shared their knowledge of the obstacles many parents face, specifically issues surrounding initial conversations about financial difficulties.		
Food and Drink	N/A		
What, if any, barriers had to be overcome when developing the initial idea of the project?			
<p>There was some initial resistance about the development of the Tool. Some were afraid to talk about their finances and personal circumstances, and frontline workers were worried about not knowing where to refer parents and families. These barriers have been overcome. The questionnaire is easy for individuals to fill out and has been thoughtfully co-produced. Frontline workers think it is practical in that they now know which services to refer parents, based on the provided answers.</p>			

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What, if anything, helped enable development of the initial idea of the project?

The parents who helped develop the questions and the experiences of frontline workers who shared their difficulties helped enable the development of the initial idea.
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How long did it take between having the initial idea and starting the project?

From February-August 2025, Perth and Kinross Council is rolling out the Tool to frontline workers. The goal is for frontline workers to become familiar with the Tool, confident enough to use it and trained in the use of the Council's digital referral management system.

Who made the decision to introduce the project?
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Perth and Kinross Council.

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Early Development – Pilot Project or Feasibility Study

Was there a pilot project or feasibility study?	
No	<input checked="" type="checkbox"/>
Yes, a pilot project	<input type="checkbox"/>
Yes, a feasibility study	<input type="checkbox"/>

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Accessing the Service and Engaging with Service Users

Is there a referral process?		
	No	✓
	Yes	
Other than referral, how do potential clients come to know about the project?		
Our locality teams will raise awareness about this project.		
What is the most common way through which users typically access the service?		
Frontline worker contract meeting as standard procedure.		
Do you take steps to keep in touch / reach out to service users?		
	No	
	Yes	✓
Each service has its own outreach and comms approach.		

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Working with People with Lived Experience of Poverty

Are those with lived experience of poverty involved in <u>delivering</u> the project?	
No	✓
Yes	
Are people with lived experience of poverty involved in <u>managing</u> the project or project governance?	
No	✓
Yes	
Are people with lived experience of poverty involved in <u>any other aspect</u> of the project? <i>If so, please describe below.</i>	
No	
Yes	✓
Parents with lived experience of poverty helped develop the questionnaire for the Tool.	

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Leadership, Governance and Partnership Working

Who is responsible for managing the project?		
Perth and Kinross Council.		
Is this the only responsibility of the person managing the project?		
	Yes	
	No	✓
As a council, Perth and Kinross Council have various responsibilities related to citizens residing in the area.		
What proportion of the manager's overall workload is given over to this project?		
	Most of it	
	About half of it	
	Just a small proportion of it	✓
Is there a Project Steering or Advisory Group?		
	No	
	Yes	✓
Poverty Working Group which has members from across the Council and external partners.		
Are any other governance arrangements in place to review strategy and performance?		
	No	✓
	Yes	

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Links to Wider Policies, Strategies and Statutory Requirements

In your opinion, is the project aligned with national and/or local anti-poverty strategies and priorities ?		
	Don't know	
	No	
	Yes	✓
<p>The Tool aligns with Perth and Kinross Council's aim to tackle poverty in the area. It helps the Council identify unmet need and how to best address it through concrete steps, for instance frontline workers now know precisely where to refer parents who require support. It also provides the Council with detailed data about poverty and other challenges in Perth and Kinross. The Tool provides a breakdown of where there is unmet need, for instance by school or local area. This provides them with the insight to tackle various issues in specific localities.</p>		
In your opinion, has the project benefitted from being part of this anti-poverty strategy?		
	Don't know	
	No	
	Yes	✓
Yes – this lent the project legitimacy and have it a mandate		
Is the project part of any other strategy?		
	Don't know	
	No	✓
	Yes	

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Is the project delivering a service that is a statutory commitment?	
No	<input checked="" type="checkbox"/>
Yes	<input type="checkbox"/>

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Funding

Has external funding been secured to support the work?	
No	✓
Yes	
Has a specific sum been secured from the host organisation to support this work?	
No	
Yes	✓
Please provide details of the funding that was used secured from the host organisation to support this work?	
How much funding was secured?	£12,000 was allocated by Perth and Kinross Council to develop the Tool.
For how long has funding been secured?	N/A as funding was only required for the development of the tool, for instance the running of workshops with frontline workers and parents.
Is future funding from the host organisation a possibility?	
Don't know	
No	✓
Yes	
What are the future - longer-term - prospects for this work if existing funding sources were no longer available?	
N/A. The project will not cost anything going forward as it will become a mainstream activity delivered by the Council.	

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Staffing and Resources

Do existing staff from the host organisation contribute toward the work of this project as part of their broader work for the organisation?			
		No	
		Yes	✓
Perth and Kinross Council staff contribute to the development and delivery of the Tool. Frontline workers in Perth and Kinross now integrated the Tool into their referral processes.			
Are existing staff from the host organisation paid extra (for example, taking on extra hours) to contribute toward the work of this project?			
		No	✓
		Yes	
Have additional paid staff been employed to contribute toward the work of this project?			
		No	✓
		Yes	
Are volunteers involved in delivering the project?			
		No	✓
		Yes	
Are specific resources – other than staff/volunteer time and money - needed to support the delivery of the project?			
	No	✓	
			Yes

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Were new IT systems, additional software, or upgrades existing software (databases, Apps) required to deliver this project? .	
No	
Yes	✓
A digital referral management system named, 'Fort' is now up and running across some of the domains integrated into the questionnaire.	
Was additional training – for staff or volunteers - required to deliver this project?	
No	
Yes	✓
Frontline workers are trained to familiarise themselves with the Tool, ensuring they are confident enough to use it. They are also trained to use Fort.	

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Monitoring and Evaluation

Is there baseline data to describe what things were like before the start of the project?				
No				
Yes				✓
As a Council, data on poverty was collected before the start of the project. However, the Tool provides the Council with a level of detail they did not previously have. For instance, the Tool breaks down specific challenges and where they are located. This enables the Council to see where specific challenges are concentrated, for instance by local area or school.				
Is the difference that the project is making measured or monitored by the host organisation?				
Yes				
No				✓
What information is collected by the host organisation about the project?				
Number of users	Yes	✓	No	
Profile of users	Yes	✓	No	
Experience of users	Yes		No	✓
Outcomes for users	Yes		No	✓
Anything else	Yes	✓	No	
The Tool collects data on challenges such as food insecurity, housing instability, utility needs, financial resource strain, employment and exposure to violence.				

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Has the data that has been collected by the host organisation been used to adapt the way the project works?	
No	✓
Yes	
Not yet – too early in the process	
Has an external organisation been employed to formally evaluate the project?	
No	✓
Yes	
Is there an intention to employ an external organisation to evaluate the impact of the project in the future?	
Don't know / no current plans	
No	✓
Yes	
Is there an intention to undertake your own formal evaluation in the future to estimate the impact of the project?	
Don't know / no current plans	
No	
Yes	✓

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Impact

To what extent have the aims of the project been achieved?	
Fully met	
Making progress toward meeting Aims	✓
Not making progress	
<p>The project has achieved its aim to identify unmet need through data collection. It has increased understanding of various issues, such as exposure to violence, food insecurity and housing instability. It is being rolled out to support frontline workers identify challenges parents face and helping them refer parents requiring support to the appropriate service.</p>	
What difference has the project made?	
<p>The project has made a difference in that frontline workers are now better equipped to refer those requiring support to appropriate services. Those requiring support are now able to get the help they need depending on the challenge they are facing. Although the Tool is a work in progress, it has provided the Council with new, detailed data on where specific issues are located and how best to tackle those obstacles.</p>	
Have conditions or demand changed since the project was introduced?	
No	✓
Yes	

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Has the project changed through time?		
		No
		Yes ✓
What changed	The questionnaire was tweaked depending on the feedback provided by parents with lived experience of poverty.	
Why has it changed	It was important to those working on the Tool that the questions asked were relevant, appropriate and sensitive to the challenges parents are facing.	
Has the project had any unexpected or unintended outcomes?		
		No ✓
		Yes
In your opinion, is the project having an impact on tackling poverty?		
		No
		Yes ✓
The project is enabling frontline workers to refer those living in poverty or with other challenges to services that will support them. Ultimately, it helps the Council identify unmet needs and how to overcome them.		

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Learning from Experience

What is working well?	
The simplicity of the questionnaire means parents can complete it quickly. The questions are also designed by those with lived experience to avoid causing offence. Frontline workers also think the Tool is logical and relevant to their work.	
What, if anything, is working less well?	
The initial hostility towards the Tool was a difficulty, however this has since been overcome.	
What are the key learning points that you'd like to share with other practitioners?	
Co-production takes longer and is more resource intensive, but it also builds support for the approach Frontline workers/manager who were sceptical about the approach set aside their concerns when they found out it was the product of a robust co-production exercise We are now using it in surveys as well as face to face which we did not anticipate.	
Are there plans to develop or expand the project in the future?	
No	<input type="checkbox"/>
Yes	<input checked="" type="checkbox"/>
Develop and promote mainstream use of the Tool.	
How easily do you think this project could be replicated in another setting?	
Fairly Easily – advice from the US and Canada suggests that the questions should be developed locally as this builds commitment and ensures relevance.	

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