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## 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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<b>Title</b>	Maximise Angus!
<b>Organisation</b>	The Angus Council Welfare Rights Team and Education and Lifelong Learning
<b>Category</b>	Fully Validated Effective Local Practice
<b>Poverty Impact</b>	Mitigation
<b>Introduction to the Project</b>	
<p>The Maximise Angus! Project is a collaborative effort between Education and Lifelong Learning in Angus, managed by the Angus Council Welfare Rights Team. Initiated in July 2022 and predicted to run for two years, the project employs a holistic approach to develop and normalise advice to families and contribute towards reducing child poverty in the Angus area. Two Financial Wellbeing Practitioners work with schools to provide guidance on budgeting, debt management, and accessing financial assistance and charitable applications. The project encourages schools and education colleagues to prioritise financial wellbeing and poverty reduction in their work with families.</p>	

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**Initial Idea**

<b>Who had the initial idea?</b>			
Kim Banks and Dawn Rennie.			
<b>How did the idea for the project come about?</b>			
The project was inspired by existing child poverty issues in Angus and the success of similar poverty alleviation projects in Scotland.			
<b>Were plans informed by any published reports / papers / research evidence or practice from elsewhere?</b>			
			No
			Yes
			✓
No specific reports were used in the original planning of the project. However, research evidence by similar child poverty alleviation projects (such as the Maximise Edinburgh Project) encouraged the project's development in reflection of their implementation, success, and demand for financial wellbeing services in schools.			
<b>Was anyone else involved in developing the initial idea of the project?</b>			
			No
			Yes
			✓
<b>Were those with lived experience of poverty involved in developing the initial idea of the project?</b>			
			No
			Yes
			✓
<b>Was funding required to support the development of the initial idea of the project?</b>			
		No	✓
		Yes	

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<b>Please provide details of the funding that was used to support the development of the initial idea of the project.</b>			
<b>Which organisation provided funding?</b>		N/A	
<b>How much was required?</b>		N/A	
<b>What was the specific source of funding?</b>		N/A	
<b>Were specific resources – other than funding - needed when developing the initial idea of the project?</b>			
No	✓	Yes	
<b>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></b>			
<b>Staff/Volunteer Time</b>	N/A		
<b>Facilities / Workspace</b>	N/A		
<b>Equipment</b>	N/A		
<b>Local Knowledge</b>	Dawn Rennie provided insight of poverty issues in schools and had pre-existing relationships and connections with school staff in Angus.		
<b>Food and Drink</b>	N/A		
<b>Did any barriers have to be overcome when developing the initial idea of the project?</b>			
		No	
		Yes	✓
<p>The coronavirus pandemic had a significant impact on the initial planning and delivery of the project, leading to a temporary hold on its development. Kim Banks and Dawn Rennie prioritised alleviating poverty issues exacerbated by the pandemic before finalising the initial project idea. Once the project was established, two main barriers emerged:</p> <p>Time restrictions – issues while scheduling time to meet with head teachers and other school staff.</p> <p>Emphasising the value of the Maximise Angus! service and financial advice in general during busy times.</p> <p>Solution: simple referral forms and an easy/non-time-consuming referral pathway process.</p>			

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<b>Did anything in particular enable development of the initial idea of the project?</b>	
	No
	Yes ✓
The pre-existing relationships and connections that Dawn Rennie had with education institutions, as well as Kim Banks' connections within the Angus Council Welfare Rights Services played a vital role in the development and initial success of the project.	
<b>How long did it take between having the initial idea and starting the project?</b>	
The timeline from the initial idea for this project was impacted by the coronavirus pandemic. However, the application for this project was submitted in October 2021, and the project was initiated in July 2022, taking approximately 9 months for the project to be approved.	
<b>Who made the decision to introduce the project?</b>	
Kim Banks and Dawn Rennie.	

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### Early Development – Pilot Project or Feasibility Study

<b>Was there a pilot project or feasibility study?</b>	
<b>No</b>	
<b>Yes, a pilot project</b>	✓
<b>Yes, a feasibility study</b>	
<b>What did the pilot study or feasibility study involve?</b>	
<p>A small pilot study was conducted before the coronavirus pandemic as the barriers to families accessing and visiting the welfare rights office was clear. A small number of drop-in financial advice services were initiated at school events in low-income areas in Angus. These areas were identified by Dawn Rennie who had connections in the schools with the highest levels of deprivation in Angus, according to the Scottish Index of Multiple Deprivation Scale. However, the pandemic arrived and there wasn't enough time or opportunity to evaluate their work. The team was still in the experimental stage with the sole aim of discovering what they could do to meet the needs of low-income children and families within education.</p>	
<b>Who was responsible for the design and/or delivery of the pilot or feasibility study?</b>	
<p>Kim Banks and Dawn Rennie developed the project and hired a welfare rights officer to assist them with drop-in sessions in schools.</p>	
<b>Were those with lived experience of poverty among those involved in the design or delivery of the pilot project or feasibility study</b>	
<b>No</b>	✓
<b>Yes</b>	
<p>People with lived experiences of poverty were only involved in providing feedback.</p>	

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<b>Was funding required to support the pilot project or feasibility study?</b>			
No	✓	Yes	
Please provide details of the funding that was used to support the pilot project or feasibility study.			
<b>Which organisation provided funding?</b>	N/A		
<b>How much was required?</b>	N/A		
<b>What was the specific source of funding?</b>	N/A		
<b>Were specific resources needed to support the pilot project or feasibility study?</b>			
No		Yes	✓
Please provide details of the resources that were required for the pilot project or feasibility study. <i>If not needed, please add N/A</i>			
<b>Staff/Volunteer Time</b>	Not specified.		
<b>Facilities / Workspace</b>	Facilities were provided by schools across Angus.		
<b>Equipment</b>	Banners/advertising equipment was used, as well as standard IT equipment such as computers.		
<b>Local Knowledge</b>	Dawn Rennie suggested which schools were best to approach.		
<b>Food and Drink</b>	Provided by schools.		
<b>Was the pilot project or feasibility study evaluated?</b>			
	No	✓	
	Yes		
No – unable to complete work due to COVID restrictions.			

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<b>Was there evidence from the pilot project or feasibility study that confirmed that it was working / it would work?</b>	
<b>No</b>	
<b>Yes</b>	✓
Based on the number of referrals received, it was evident that there was a need for the service in Angus. Moreover, positive feedback from school staff as well as future referrals they recommended confirmed that the service is essential. Staff reported many cases of parents and families reaching out for emergency financial support.	
<b>Who made the decision to continue with the project beyond the pilot or feasibility study?</b>	
Kim Banks.	
<b>Was the design of the project modified following the pilot project or feasibility study?</b>	
<b>No</b>	
<b>Yes</b>	✓
The pilot project illustrated the negative labels attached to 'welfare rights advice' advertising in schools. The stigmatisation behind welfare rights advice and support was made clear by the small number of parents approaching the Angus team in school events. Consequently, the team decided to use a different approach to advertising/promoting their service. Instead of being 'welfare rights advisors', they changed their names to 'financial wellbeing practitioners', to decrease stigma, and developed a more 'informal' approach to gaining referrals, such as approaching families in casual conversation.	

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## Accessing the Service and Engaging with Service Users

<b>Is there a referral process?</b>		
	No	
	Yes	✓
<p>Yes. The referral form is designed to be simple and easy to use, with a single page containing basic information such as the family name, address, and the nature of their needs. Referrals are typically made by schoolteachers, head teachers, or other senior staff members, and are sent to a designated inbox for the welfare rights team. From there, a member of the administration team assigns the referral to one of two workers, who then respond within a maximum of five working days. In practice, however, responses are typically provided within two to three days. In cases of emergency or crisis situations, referrals are marked as urgent and are mostly addressed on the same day.</p>		
<b>Is referral the only way that potential clients are made aware of the project?</b>		
	Yes	
	No	✓
<b>Other than referral, how do potential clients come to know about the project?</b>		
<p>Information is sent out via Head Teacher Mail, which is a newsletter that goes out to all head teachers who then identify and spread awareness to clients. The Maximise Angus! staff are also available to raise awareness during head teacher cluster meetings and school events such as parents' evenings and social events. The team attends these events and also attends holiday provisions to ensure that staff members are available to support families and maximise their incomes during school closures.</p>		
<b>What is the most common way through which users typically access the service?</b>		
Referral.		

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Do you take steps to keep in touch / reach out to service users?	
No	
Yes	✓
<p>The service uses a mixed-methods approach to keeping in contact with its users. In terms of gaining referrals, the team approach families in person at school events. While keeping in contact with service users, the service offers face-to-face meetings in schools or at home visits, and through emailing or phone calls. Depending on the severity/complexity of cases, some clients prefer over the phone contact or in person contact. Therefore, no version of contact is most common/popular, the method of contact is individual to every case.</p>	

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## Working with People with Lived Experience of Poverty

<b>Are those with lived experience of poverty involved in <u>delivering</u> the project?</b>		
	<b>No</b>	
	<b>Yes</b>	✓
<p>The project does not aim to use people with lived experience of poverty in the delivery of the project, aside from feedback. However, one financial wellbeing practitioner happens to have a personal experience of poverty. According to Kim, the member of staff is particularly relatable to clients which has been helpful in creating strong relationships and trust with families, which is essential in 'breaking down barriers' and fully supporting those in crisis.</p>		
<b>Are people with lived experience of poverty involved in <u>managing</u> the project or project governance?</b>		
	<b>No</b>	✓
	<b>Yes</b>	
<b>Are people with lived experience of poverty involved in <u>any other aspect</u> of the project? <i>If so, please describe below.</i></b>		
	<b>No</b>	
	<b>Yes</b>	✓
<p>People with lived experience of poverty are only involved in feedback.</p>		

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**Leadership, Governance and Partnership Working**

<b>Who is responsible for managing the project?</b>		
Kim Banks.		
<b>Is this the only responsibility of the person managing the project?</b>		
	Yes	
	No	✓
As well as managing the project, Kim gained additional funding for parents in immediate financial crisis as part of a discretionary fund. Managed by Kim, the team use a 'cash first approach' to alleviate financial emergency which provides families with funds to afford essential items (such as clothes or essential household items) or to pay off immediate debt in emergency situations. Similarly, the team also provide families with supermarket vouchers.		
<b>What proportion of the manager's overall workload is given over to this project?</b>		
	Most of it	
	About half of it	
	Just a small proportion of it	✓
<b>Is there a Project Steering or Advisory Group?</b>		
	No	✓
	Yes	
<b>Are any other governance arrangements in place to review strategy and performance?</b>		
	No	
	Yes	✓
Monthly performance reports are provided to the Angus Council.		

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### Links to Wider Policies, Strategies and Statutory Requirements

<b>In your opinion, is the project aligned with national and/or local anti-poverty strategies and priorities?</b>		
	<b>Don't know</b>	
	<b>No</b>	
	<b>Yes</b>	✓
<p>The project is part of the Child Poverty Action Group and Bright Futures strategy. The CPAG and Bright Futures group aim to reduce child poverty in Scotland and to alleviate wider poverty issues such as social mobility and educational attainment restrictions. The project is also part of the Scottish Government's Child Poverty Action Plan (aimed at reducing the number of children living in poverty to fewer than 5% by 2030).</p>		
<b>In your opinion, has the project benefitted from being part of this anti-poverty strategy?</b>		
	<b>Don't know</b>	
	<b>No</b>	
	<b>Yes</b>	✓
<b>Is the project part of any other strategy?</b>		
	<b>Don't know</b>	
	<b>No</b>	✓
	<b>Yes</b>	
<b>In your opinion, has the project benefitted from being part of this strategy?</b>		
	<b>Don't know</b>	
	<b>No</b>	
	<b>Yes</b>	
N/A		

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<b>Is the project delivering a service that is a statutory commitment?</b>	
No	<input type="checkbox"/>
Yes	<input checked="" type="checkbox"/>
Yes, the Angus team have joined with local authorities to report their activity in reducing child poverty in line with the Scottish Government's Tackling Child Poverty Delivery Plan.	
<b>In your opinion, what has been the impact on the project of having this statutory commitment?</b>	
Don't know	<input type="checkbox"/>
None	<input type="checkbox"/>
Negative	<input type="checkbox"/>
Positive	<input type="checkbox"/>
Not specified.	

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## Funding

<b>Has external funding been secured to support the work?</b>		
	<b>No</b>	
	<b>Yes</b>	✓
<b>Please provide details of the external funding that was used secured to support this work?</b>		
<b>Which organisation provided funding?</b>	The Scottish Government.	
<b>What was the specific funding stream/source/scheme?</b>	A joint application was submitted by Banks and Rennie for COVID19 recovery money.	
<b>How much funding was secured?</b>	The team received £200,000 to fund two years of service. Both members of staff cost £40,000 per annum.	
<b>For how long has funding been secured?</b>	2 years.	
<b>Is future funding from the same external source a possibility?</b>		
	<b>Don't know</b>	N/A
	<b>No</b>	N/A
	<b>Yes</b>	N/A
<b>Is future funding from the same external source based on pre-agreed outcomes or outputs being delivered from this work?</b>		
	<b>No</b>	
	<b>Yes</b>	✓
Due to being part of the COVID-19 recovery money, the team need to ensure that families are being lifted out of poverty, and that child poverty issues in Angus are being targeted.		

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<b>Has a specific sum been secured from the host organisation to support this work?</b>	
<b>No</b>	✓
<b>Yes</b>	
<b>Please provide details of the funding that was used secured from the host organisation to support this work?</b>	
<b>How much funding was secured?</b>	N/A
<b>For how long has funding been secured?</b>	N/A
<b>Is future funding from the host organisation a possibility?</b>	
<b>Don't know</b>	N/A
<b>No</b>	N/A
<b>Yes</b>	N/A
<b>Is future funding from the host organisation based on pre-agreed outcomes or outputs being delivered?</b>	
<b>No</b>	
<b>Yes</b>	
N/A	
<b>What are the future - longer-term - prospects for this work if existing funding sources were no longer available?</b>	
N/A	

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## Staffing and Resources

<b>Do existing staff from the host organisation contribute toward the work of this project as part of their broader work for the organisation?</b>		
	<b>No</b>	
	<b>Yes</b>	✓
<b>Are existing staff from the host organisation paid extra to contribute toward the work of this project?</b>		
	<b>No</b>	✓
	<b>Yes</b>	
<b>Have additional paid staff been employed to contribute toward the work of this project?</b>		
	<b>No</b>	
	<b>Yes</b>	✓
<p>Yes. Other than Kim Banks and Dawn Rennie, there are two Financial Wellbeing Practitioners on 23-month contracts. They were introduced to schools through cluster meetings with head teachers, parent/child learning events and parent’s evenings. Their role in these meetings was to emphasise the ethos behind the Maximise Angus! Project, rather than simply as financial welfare advisors due to stigmatisation. ‘Very informal’ strategy was used to break down barriers and to encourage engagement. The overall day-to-day role of the staff is to respond to emergency financial support cases as soon as possible, and to continuously support families in crisis through benefits, debt, and money advice.</p>		
<b>Are volunteers involved in delivering the project?</b>		
	<b>No</b>	✓
	<b>Yes</b>	

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<b>Are specific resources – other than staff/volunteer time and money - needed to support the delivery of the project?</b>	
No	Yes <input checked="" type="checkbox"/>
<b>Please provide details of the resources that are required to deliver the project? <i>If not needed, please add N/A</i></b>	
<b>Facilities / Workspace</b>	Offices are provided by the Angus Council and meeting and event facilities are provided by schools.
<b>Equipment</b>	No equipment is required other than computers/internet access for the standard benefit calculators and patient recording systems. (Provided by Angus Council)
<b>Local Knowledge</b>	Knowledge of families in crisis across the schools are identified and passed on by the schools.
<b>Food and Drink</b>	N/A
<b>Are any of the resources needed to deliver the project provided in-kind, rather than budgeted from project funds?</b>	
No	Yes <input checked="" type="checkbox"/>
No IT systems or software was purchased. The Angus Council provided the team with access to the benefit calculator and patient recording software.	
<b>Were new IT systems, additional software, or upgrades to existing software (databases, Apps) required to deliver this project? .</b>	
No	Yes <input checked="" type="checkbox"/>
Yes	<input type="checkbox"/>
<b>Was additional training – for staff or volunteers - required to deliver this project?</b>	
No	Yes <input checked="" type="checkbox"/>
Yes	<input type="checkbox"/>

Tackling Poverty Locally Online Directory

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## Monitoring and Evaluation

<b>Is there baseline data to describe what things were like before the start of the project?</b>	
No	✓
Yes	
No baseline data was recorded. The knowledge of what individual cases were like prior to the project is anecdotally provided by clients in meetings and through feedback. Larger scale baseline data such as poverty rates in different local areas was accessed online and through insight from schools.	
<b>Is the difference that the project is making measured or monitored by the host organisation?</b>	
Yes	✓
No	
<b>Who within the host organisation is responsible for monitoring the impact of the project?</b>	
The data for each client is recorded and uploaded by a financial wellbeing practitioner at the beginning of every case.	
<b>How often is the impact of the project monitored or measured by the host organisation?</b>	
The project uses a patient recording system 'Advice Pro'. The data for each client is recorded and uploaded by a financial wellbeing practitioner at the beginning of every case.	
<b>What methods, techniques or strategies are used by the host organisation to measure the impact of the project?</b>	
The project's impact is measured through regular feedback and meetings between clients and financial wellbeing practitioners. Schools also play an important role in this process by sharing insights from families, which help practitioners refine the service and strengthen its outcomes.	

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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	
Most information is collected for each case. This data is collected following the initial referral process by a financial wellbeing practitioner.				
Has the data that has been collected by the host organisation been used to adapt the way the project works?				
			No	
			Yes	✓
Yes, the collected data has been used to adjust the project's operations, particularly by responding to demand in specific areas.				
Has an external organisation been employed to formally evaluate the project?				
			No	✓
			Yes	
Has the insight from the external organisation's evaluation been used to adapt the way the project works?				
			No	
			Yes	
N/A				

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<b>Is there an intention to employ an external organisation to evaluate the impact of the project in the future?</b>	
<b>Don't know / no current plans</b>	✓
<b>No</b>	
<b>Yes</b>	
This is something that the project is interested in, however this only depends on future funding which is not guaranteed.	
<b>Is there an intention to undertake your own formal evaluation in the future to estimate the impact of the project?</b>	
<b>Don't know / no current plans</b>	
<b>No</b>	
<b>Yes</b>	✓

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## Impact

<b>To what extent have the aims of the project been achieved?</b>	
<b>Fully met</b>	✓
<b>Making progress toward meeting Aims</b>	
<b>Not making progress</b>	
<p>The project has been highly successful in achieving its aims. It has provided support to numerous families in financial crisis, helping them maximise their income, and providing them with connections and resources for long-term financial support. This is evidenced by the substantial financial gains made by the project in the first year alone. Families have gained up to £400 per month, amounting to a total of £702,200, which has had a significant positive impact on the financial security of low-income families with children in Angus.</p>	
<b>What difference has the project made?</b>	
<p>In its first year, the project has made a significant impact by supporting 314 clients, resolving 517 inquiries, and generating £702,200 in financial gains for families experiencing financial hardship. The project has brought:</p> <p><u>Positive financial benefits/effective crisis intervention for children and families</u></p> <p>The project has increased the household income and entitlements for 314 children and their families in Angus. In many cases, it has provided families with additional gains to their income of up to £400 per month with a total of £702,200 of financial gains in one year. This additional income has had a positive impact on a number of areas, including reducing debt distress and mental health issues, improving housing security, and enabling access to childcare. The project has not only improved clients' financial wellbeing, but also their overall quality of life.</p> <p><u>Decreased pressure for education staff/more effective educational support for children</u></p> <p>Families are under far less financial pressure, which also decreases pressure for head teachers. Therefore, head teachers are able to concentrate on their role in education, rather than acting as welfare rights advisors. This also allows parents to support their children's learning more at home.</p>	

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<b>Have conditions or demand changed since the project was introduced?</b>	
<b>No</b>	
<b>Yes</b>	✓
<p>The project was initially designed to operate in small, targeted areas within Angus. However, the economic impact of the pandemic has intensified poverty levels, resulting in a rapid and unplanned expansion of the project's scale to meet growing community needs.</p> <p>Despite the rapid increase in demand, however, a lack of long-term funding restricts the number of clients that the team can support.</p>	
<b>Has the project had the capacity to meet these changing conditions and demand?</b>	
<b>Yes</b>	
<b>No</b>	✓
<p>No, as mentioned above, the number of clients the project can support is restricted by a lack of long-term funding.</p>	
<b>Has the project changed through time?</b>	
<b>No</b>	
<b>Yes</b>	✓
<b>What changed</b>	<p>Scale: The demand for the service and number of referrals increased                      Location: The project evolved to Angus-wide</p>
<b>Why has it changed</b>	<p>Demand for the service came from areas in Angus that were not originally targeted. Due to increasing demand from all areas across Angus, the project had to adapt and become Angus-wide, instead of in specific low-income areas.</p>
<b>Has the project had any unexpected or unintended outcomes?</b>	
<b>No</b>	
<b>Yes</b>	✓
<p>Dawn Rennie acknowledges the project's success in raising a significant amount of money for low-income families. However, she also highlights the unexpected scale of unclaimed funds that these families were entitled to but had not accessed. In contrast, Kim Banks, drawing on her background in welfare rights, was not surprised by the scale of unclaimed benefits or the number of families suffering from financial crisis.</p>	

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In your opinion, is the project having an impact on tackling poverty?	
No	<input type="checkbox"/>
Yes	<input checked="" type="checkbox"/>
The project directly tackles poverty in schools by providing families with additional financial support. It also has wider poverty alleviation impacts, such as family crisis intervention and prevention, increased educational attainment, social mobility, and crime reduction.	

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## Learning from Experience

### What is working well?

Rebranding the names of the financial advisors to 'financial wellbeing practitioners' and creating an informal approach was essential to engaging with families facing hardship. According to Kim, breaking down the barriers upheld by stigmatisation surrounding debt and benefits advice, and approaching parents in a casual conversation was crucial for the success of the project.

Similarly, strong relationships between the team and school staff are effective at 'breaking down barriers' and providing the best possible support for children and their families. Additionally, strong workplace relationships have encouraged a high standard of work/service.

The straightforward referral process is very effective in engaging schools and families.

Offering families in immediate financial crisis access to emergency funding and supermarket vouchers was also influential in engaging with families in emergency situations.

### What, if anything, is working less well?

The demand for the project has made the lack of staff (due to funding restrictions) a major issue. This has also had an impact on the project's advertisement, as the team is only able to take on a limited number of people at a time.

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**What are the key learning points that you'd like to share with other practitioners?**

Be realistic and plan carefully. Do not oversell a project if you cannot keep up with demand

The scale of your project is completely dependent on funding. If the service is too heavily promoted/advertised, you may risk being 'swamped' or 'overrun' which will result in a bad reputation and negative outcome for your clients. Instead, plan carefully on how you design, deliver, and overview your project.

Have a clear idea of the project and how to engage with authorities

Involving head teachers and promoting the services from the beginning of the project was crucial for engagement. By sharing information about the project as soon as funding was secured, the head teachers were aware of the project and what it would entail. This approach allowed for a gradual introduction of the project to the school staff, rather than overwhelming staff with information. The project team lessened the welfare rights aspect of the project to avoid stigma and instead emphasised the Maximise Angus! ethos in supporting families facing financial hardship. This approach changed the mindset around the project and made it more approachable for school staff.

A simplistic referral pathway is essential in maintaining engagement

It should be clear and easy to use, without the need for complex information. Basic guidance should remind school staff that it is an opportunity for them to use and a resource they can take advantage of. Given the busy schedules of teaching staff, it is important to provide clear and concise reminders to ensure the project does not fall off their radar.

**Are there plans to develop or expand the project in the future?**

<b>No</b>	
<b>Yes</b>	

The future of the project is dependent on securing long-term funding.

**How easily do you think this project could be replicated in another setting?**

The project has the potential to be easily replicated in a different setting, provided that sufficient funding is available. Kim recommends that in order to replicate the Maximise Angus! model, practitioners must have a clear understanding of their target audience, know how to effectively engage and contact them, and have the necessary time and resources to support them.