



## **Faith in Community Dundee Cash First Volunteer Project: May 2023-March 2025**

### **Summary of cash first work so far**

Faith in Community Dundee adopted and actioned a cash first approach in Dundee as part of the Menu for Change programme, led by Nourish Scotland and other key partners. With input from community projects, people with lived experience and advice services, we developed a financial pathway resource, What Do I Do If...? which highlighted relevant, timely and appropriate services in Dundee for someone facing financial crisis. In addition to wide public dissemination of the pathway resource (which has now been developed nationally) the project included a multi-sectoral training session as well as bespoke training opportunities for staff and volunteers across relevant services and organisations to ensure the resource was implemented and put into use with confidence. This demonstrated that volunteers and staff working in the community are more likely to use and engage with a resource when they have training about its relevance and use in their daily practice. We continue to distribute the leaflet city wide and have since developed a 'Resource Toolkit' – a categorised bank of resources with information on a wide variety of support needs incl. cost of living, money advice, energy and energy debt, housing, employment, substance use and mental health. We secured funding for 9 laptops for community food projects, uploading the Resource Toolkit to each one with other relevant signposting information.

Using this Resource Toolkit, and mapping and identifying training needs within the Dundee Community Food Network, we worked in partnership with the Maxwell Centre and alongside advice services and other partners to develop and deliver a 4-step Cash First training programme to 10 volunteers from 9 projects covering 5 wards:

- Active listening, boundaries, confidentiality
- Mental Health Support
- Substance Use/Stigma
- Cash First Approach - signposting/referring/Resource Toolkit

It became apparent from feedback from projects that this was a dedicated role that would benefit them and the people that access food support

*A. has been able to engage with clients across each of the cafes across 4 wards – however due to low volunteer numbers, this engagement has been pulled back at times to accommodate other café needs.*

*Our volunteer who took part in the training sadly passed away, so we weren't able to do implement it. We have 2 volunteers we would like to become CFV's.*

*We would be interested in any future training around this and would try to have a member of the team dedicated to this or are open to a volunteer coming in to do this engagement work.*

*We were able to engage successfully initially, particularly to discuss energy cost issues and signpost, but as numbers increased and due to low volunteer numbers, the CFV could only focus on larder and food distribution.*

Working in partnership with Dundee Foodbank, Taught by Muhammad Foodbank and Brooksbank Food Link worker, we then identified the key issues both Foodbanks were facing with referrals, developed a new 3-step referral strategy (incl. directing people to money advice services), and delivered a training session targeting Foodbank referrers and other partners. Over both sessions, 97 people attended from across sectors and areas of Dundee, who also expressed interest in cash first/money advice training moving forward.

In partnership with Nourish Scotland, Maxwell Centre, DCC Advice Services and DCC Partnership, and implementing learning from the triaging and integrated approach of the Fuel Well Scheme, we then delivered Dignity in Practice and Cash First Approach training sessions to 60 people from across those agencies.

We continue to map the access to advice services within each locality, identifying gaps in provision and assessing the most effective trusted entry points to this support, including remote and in person engagement. We have also coordinated the delivery of Mental Health First Aid Training to 60 volunteers across the Dundee Community Food Network and continue to update and develop the Resource Toolkit (with input from DCC Advice Services) and assess other training needs.

### **Proposed Project, with outcomes and activities over 2 years**

#### **Cash First Volunteers:**

A Cash First Volunteer (*the intention is to rename this role, with advice and input from Dundee Fighting for Fairness and community input*) will be based within an identified trusted entry point which is accessible within the community, and their role is to be the first contact with someone presenting in a financial crisis or seeking support. By implementing informal learning practices, such as active listening skills, they can effectively triage and identify what this support could look like and how to help someone engage with the relevant money advice services. They will have an in-depth knowledge of the money advice services across the city, and broad knowledge of other services including mental health, substance use, and housing, to effectively signpost and refer, and assess other key steps to help someone along their journey, which may include some advocacy support.

The aim is to have coordinated access to and engagement with advice across localities – ensuring there's a coordinated approach to advice workers and volunteers access across the city (this has already started with advice services and online resources re community laptops and WDIDI training).

#### **Partnership at the heart:**

At the heart of this work is partnership, with Dundee Foodbank, Dundee Community Food network, Dundee City Council Advice Services, Citizens Advice Bureau Dundee, Brooksbank, NHS Public Health, and other wider partners.

We are already actively working on a Memorandum of Understanding with Dundee Foodbank outlining how the 2 organisations will work together over the 2 year period.

We will lead on the development of this role, employing a Coordinator to drive this forward, with support from our Project Lead and Director.

**Cash First Training programme:**

This is a key element of the project.

We will build on prior experience to develop the training course, working collaboratively with Dundee Foodbank and key partners, drawing from previous training delivered by both organisations, partner input and wider training available (ie Money Guiders Programme, CAB, Money Advice Scotland, CAS, CPAG, MATRICS ). We will bring in key partners and facilitate the training, rather than deliver it all ourselves.

Dundee partners will include:

- Active listening, boundaries, confidentiality – FiCD, possibly NHS Listening Services
- Mental Health Support – Sources of Support or DVVA Mental Wealth Academy
- Substance Use/Stigma – We Are with You or Parish Nursing
- Cash First Approach - signposting/referring/Resource Toolkit – FiCD and money advice services (DCC advice, CAB, Brooksbank)

A key factor in developing the training in other localities across the country will be identifying the relevant partners in these settings – third sector and statutory. Building relationships with these local services will be beneficial to the overall success of any signposting/referral role, therefore we would recommend this as a priority and build key content elements into the training to guide potential partners on the input required.

We would request that this training be open source and not ‘owned’ by one organisation. As we develop the training, we will ensure Dundee Foodbank will be able to use the training course. We will work together with Dundee Foodbank (level of involvement to be decided operationally) to train and support the first cohort of volunteers.

Dundee Foodbank have identified potential volunteers in the foodbank who are ready and keen to stretch their role and engage more with visitors. We will pilot the training together: 5/6 volunteers from Dundee Foodbank (to remain within Dundee Foodbank); 3 volunteers from community cafes and 3 volunteers from community larders (a potential first cohort of 10-12 volunteers).

We will measure the following:

- Engagement rate of volunteers in training
- Successful completion of training
- Drop-out rate
- Progression of volunteers to actively delivering in community access points.

**3 step referral strategy:**

Building on our success delivering the 3 step referral strategy to Dundee Foodbank referring partners, we will develop and integrate this into the wider training offered to all services across the city. We will continue to work with Dundee Foodbank regarding any further sessions being delivered to Foodbank referrers.

Once the training programme and 3 step referral strategy has been piloted in Dundee we will review its transferability to other parts of Scotland, including blended learning for remote areas – e learning and remote learning. We will explore relevant accreditation and work with Trussell Trust to take the training through this process.

#### **Input and Feedback from key stakeholders:**

The cash first volunteer role developed out of years of working with community led food projects, listening and developing/sourcing training for volunteers, working with the advice agencies across the city and working with Oxfam Menu for Change to develop the What Do I Do If...? resource.

This idea was discussed with Dundee Fighting for Fairness (DFFF - lived experience group):

- People feel stigma and shame about going to advice agencies.
- Like the idea, think it will work, especially the idea of connecting with people in local places they are comfortable in
- Like the idea local people with lived experience are prioritised to be trained in this role
- Encourage employers to take this up for their CPD for their employees – they can be their cash first champion
- Don't just link it to the larders, link it to the venues they're in so that they're available more frequently than cafes and larders – work towards this
- Approach the libraries, community centre staff, community police, housing association receptions
- Legitimise the accreditation so that it's promoted and accepted just like First Aid is

We also met a number of times with the money advice services, the Council Community Planning Manager and representatives from Directorate of Public Health: Welfare Reform/Health & Financial Inclusion:

- capacity stops money advice services from being able to be present in all communities all the time
- there is increased need for money advice to help people maximise income and minimise debt
- acknowledgement that the landscape for advice can be quite confusing
- community projects are often the TRUSTED ENTRY POINT - less stigma for people going to community cafes in community centres or to larders, easier to access support through these places
- community based support is needed to enable initial access to and engagement with money advice agencies
- volunteers can help people be realistic about appointment times/manage expectations and support people while they wait: can advise and direct people in that waiting time (wider knowledge of services and support)
- skills gap in their workforce and difficulties in staff retention and bringing new people into the advice sector, this may begin to build opportunities especially if connected with the Employability services in the city.

- volunteers can prepare people for their first appointment, ensuring they bring the right paperwork. This would help speed up the process for the advice agencies, improving some capacity.
- all are keen to work on a coordinated approach to money advice across the city, including the Community Laptops and FiCD resources, and the possibility of Cash First volunteers in places they cannot be present

In all the above discussions, it was agreed that cash first volunteers could be located in:

- Dundee Foodbank (own volunteers)
- Community food projects (local, Foodbank and recruited volunteers)
- Partner organisations (their own volunteers and staff)
- Ninewells Hospital (their own volunteers)
- Other community spaces: front facing staff, ie receptionists

Dundee Foodbank and community food projects have already identified volunteers interested in the CFV role, we will promote the initial tranche across all community food projects, alongside Dundee Foodbank, inviting volunteers to an initial discussion about the role and the commitment required.

As the training and role evolves, working with the volunteers Foodbank and projects we will develop a marketing strategy to promote the role, outlining the commitment and the opportunities.

### **Tiered training approach:**

A tiered training approach is proposed:

#### **Tier1**

A triage role (not dealing with paperwork, form filling), taking a What Do I Do If Resource approach, signposting and referring to money advice and other services/support where relevant.

They would have a thorough knowledge of the money advice specific support and an understanding of the main issues people face.

Taking the informal education approach they would be trained in listening skills, substance use, mental health, boundaries, confidentiality, etc. to enable them to build relationships, listen and help people learn about the support available to them. *DFFF loved this, said it is key to connecting with people. Build up the relationship. Also assess other needs, challenges, barriers. Have a wider knowledge of other supports available, knowing where services like Sources of Support are located, etc.*

They would see people through to the point at which they see an adviser (recognising there is a waiting time for advice support – *DFFF loved this idea*)

CVF's would attend regular meetings to update and refresh knowledge and information and to share learning.

#### **Tier 2**

As above but also trained to do form filling – advice agencies will deliver training on form filling for relevant forms (even partial form filling, reduces time used by money advisers on this). This means people can be directed to them to complete forms prior to their first

meeting with adviser. This can take a huge amount of pressure off advice agencies and create a good bridge to them. It is anticipated that less volunteers will move into Tier 2 training.

### Tier 3

Citizens Advice Bureau offer training for students on CAB placements. CAB and Dundee City Council are willing to work with us to develop training that would move CFV's further towards money advice. Alongside this would be built in support from local advisers, linking each volunteer with a local money advice project, so there is suitable oversight of the advice and support being offered, a point of contact to check in with. It is anticipated that this will be the smallest cohort of volunteers. The direct connection with a money adviser is crucial at this stage, volunteers will be moving more towards an advice role. The first 18 months of the project will allow us time to work with the money advisers and employability services to develop this Tier, we would explore partnerships with Employability Services (Discover Work Partnership), giving people the opportunity to train and work at this level.

Within the development of the training programme and the tiered training approach, the Coordinator will identify relevant supports/materials and training from [Money Advice Scotland](#); [MATRICS](#) and [CPAG](#).

The Fairness Leadership Panel (facilitated by FiCD and the Council) will be exploring the possibility of a Skills Academy in Dundee, to help address the shortage of advice skills. Jacky Close facilitates the work with the Panel and will keep an open link between this and the Cash First Volunteer Project. This will include looking at The Improvement Service and their Money Guider Accreditation.

### **The FiCD Coordinators Role**

Key relationships – Dundee Foodbank, Dundee Community Food Network, the money advice services; Public Health, Dundee Fighting for Fairness, and other partner agencies.

Work collaboratively with Dundee Foodbank to align the development of the Cash First volunteer role with Dundee Foodbank Hub development.

Attend 4-6 weekly management meetings with management from both organisations to ensure we're working together and have open lines of communication regarding wider areas of work. Also, to review the project development and the learning process.

Key link with the money advice agencies - will sit on the regular money advice workers meetings to have a wider knowledge and allow them to support volunteers appropriately, and also adapt training appropriately. Continue to gauge how much info volunteers need at each stage of the Tier.

Develop the training, explore accreditation/CPD approval, build in opportunities for partners org's to input into training. Keep training up to date and ensure any updates relayed to volunteers when needed.

Volunteer recruitment, training and ongoing support – the Coordinator will be responsible for publicity, marketing, recruitment, engagement and ongoing support of volunteers. Initially volunteers will be sourced from Dundee Foodbank, from community food projects, from partner organisations, community spaces, Ninewells Hospital. The Coordinator will also explore work based volunteering opportunities. *DFFF said a priority should be people with lived experience, but not to the exclusion of others.* Regular volunteer group and 1:1 meetings to review the uptake, advise and direct, review boundaries and confidentiality, update on changes to advice, track impact of role.

Volunteer supervision – as the volunteers are already involved in the Foodbank and community food projects they will already be under supervision of the project leads within the independent projects. We are keen that we co design supervision, both the content and frequency, with the volunteers and the host projects, keeping in mind that Tier 1 is signposting and referring and does not involve any paperwork or money advice. However, we will also want to address the increase in engagement expected within each Tier and anticipate increased supervision requirements for Tier 2. For Tier 3 we would co design this stage with the Money Advice Agencies and the volunteers, as this stage involves an element of advice and needs to be carefully supported and monitored by the agree money advice agencies.

Volunteer wellbeing – identify resources the volunteer can access to keep themselves safe and well. Regular meetings with volunteers to support, supervise and give peer support and learning opportunities.

General knowledge so volunteers can go to them for any advice – be that first response for a volunteer, the Coordinator can then ascertain if the query is best addressed by a money adviser or can be addressed within this role (so as not to overload the money advisors).

Wider training – develop and deliver training to front-line workers from wider organisations. Work with Dundee Foodbank regarding foodbank referring agencies.

As volunteers gain experience and knowledge, with support from the money advice agencies, help volunteers identify priority cases and then fast tracking them to advice agencies.

With each tranche of volunteers will increase the volunteer support base needing ongoing support.

Volunteers in Tier 1 will need lighter support – regular peer group meetings with the Coordinator, sharing challenges and learning together, including any updates from the Coordinator. Refresher training will be built into this. We anticipate Tier 1 volunteers could meet 4 times per year. The Coordinator may build an expectation that Tier 1 volunteers must meet at least twice in a year to maintain their role.

Tier 2 volunteers will also attend these peer meetings but with an additional input around form filling. Any updates, changes or additions to forms will be included in refresher training as well as shared with Tier 2 volunteers as and when needed.

These volunteers will also be embedded within local community projects and will receive weekly support from the project leads, as with the other project volunteers.

At this point we need to draw a clear but helpful distinction:

Cash First Volunteers will be recruited, trained and deployed or redeployed to community projects to deliver the cash first approach as described in Tiers 1-3. These volunteers will be given ongoing support and will be expected to work within this role.

However, anyone can access the compressed and/or accredited Cash First training/ 3 step referral strategy training and be encouraged to adopt this approach within their normal volunteer/staff role. Refresher/update training may be offered annually however ongoing support is not offered. This will be similar to the approach we have taken with the What Do I Do If...? (The IFAN Money Worries Leaflet) – we have delivered one off signposting/referral training around this for many years (to Carers Centre staff, MH project staff, DWP staff, community project staff and volunteers, community food project staff and volunteers), giving people the confidence to use this resource within their own setting.

Tier 3 volunteers: the structure of ongoing support will look different for Tier 3 volunteers, this is the smallest group. This will be developed and reviewed during the first 18 months of the project, with involvement of current CF volunteers expressing interest in Tier 3, money advisers and the employability services.

#### **Cash First training for wider organisations:**

3 potential sessions available:

1. Cash first approaches to food insecurity – SWF, money advice, dignified access to food – how many attended, and some feedback
2. Dignity principles - how many attended and some feedback
3. Training/equipping referrers and front line staff to respond (ie WDIDI approach) – Danny has feedback from previous sessions that shows people are interested in this. *DFFF identified this as a good way to use cash first approach: a cash first champion/training/volunteer within the workplace.* This could be embedded into existing training for organisations and services, ie. Homestart, TCA, etc.

*DFFF - Explore whether this can become a workplace role similar to MHFA, accredited training. This may also help address in work poverty.*

#### **Transferability:**

We will develop the core training into a package that can be adapted and used elsewhere. More importantly we will develop a set of principles alongside this, that underpins the whole training approach and should be applied throughout the training. Some of the key elements of the principles are the partnership approach to training, dignity in practice and involvement of people with lived experience. Therefore, the package will contain the training and the principles, with clear guidelines embedded throughout.

It is important that the training developed within this project is transferable to other areas in Scotland/UK. As we reach the later stages of development and testing, we will, with support from Trussell Trust, seek to share the training with representatives from other areas in Scotland, focussing on diversity of area (large city, rural, small town). Giving them the training and principles, we will ask them to consider how this could be applied in their area,



and to feedback any adaptations that would make it more transferable to their specific area (or to any area). We anticipate this being done through an online meeting, having present the material for scrutiny. We will then make relevant adjustments to accommodate their feedback and therefore improve the transferability of the training.