Local prospects for poverty sensitive budgeting in Scotland:
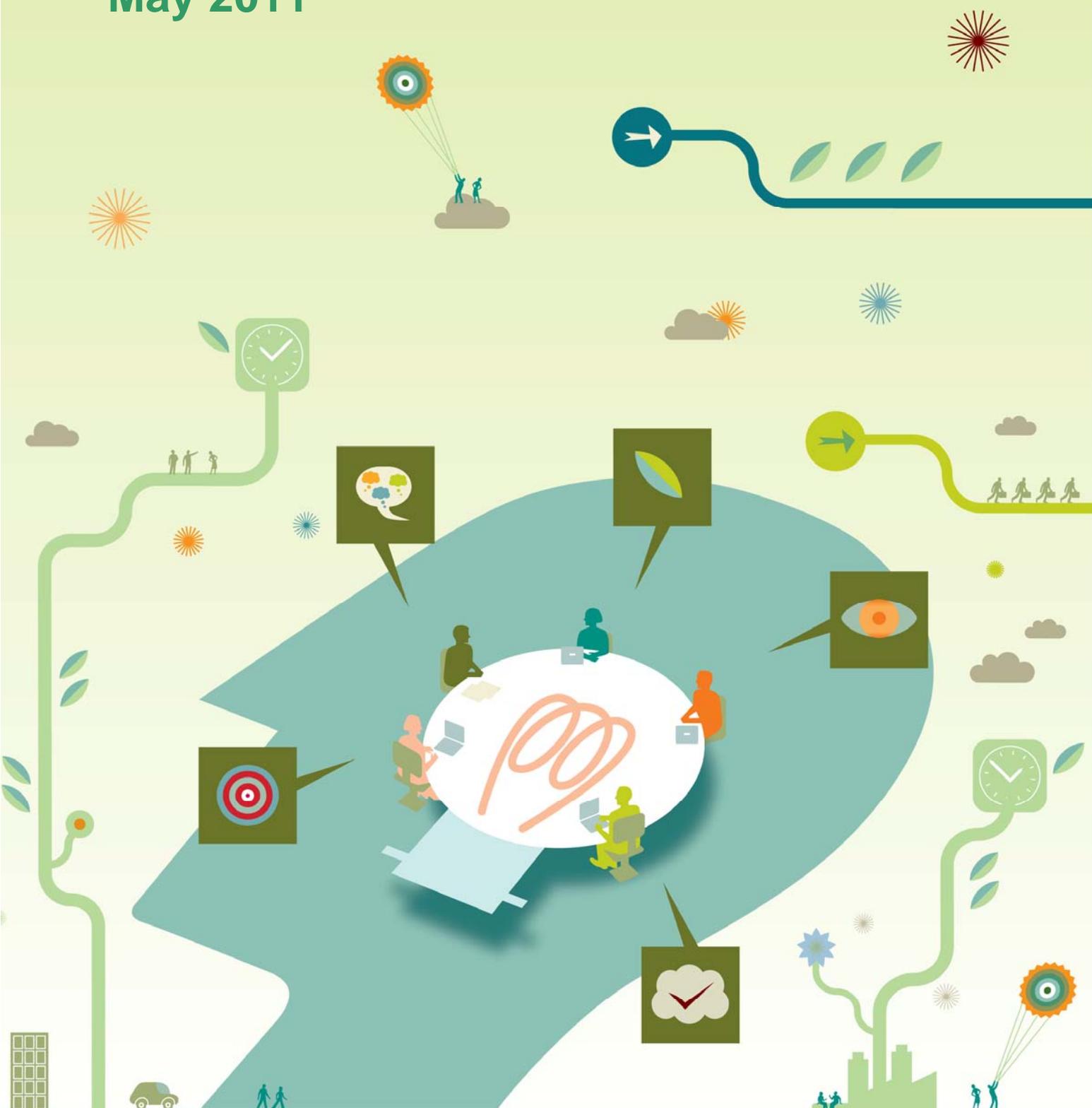
The independent reflections of an Action Learning Set

May 2011

Publishing Note

Although this report has been published as part of an action learning set supported by the Community Regeneration and Tackling Poverty Learning Network the participants were working in a personal capacity. As such the views expressed may not necessarily reflect those of the Scottish Government or their own individual organisations, Local Authorities or Community Planning Partnerships.

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Message from the authors

The financial downturn has heightened interest in public sector budgeting and local service provision. There seems to be broad agreement that public sector spending should be reduced down to a new lower and 'sustainable' level to align expenditure with income. There is some disagreement over how quickly, how much and what specifically is to be cut. The first disagreement over the speed with which budgets are to be reduced is interesting in the sense that it actually masks common agreement, i.e. that there is a need to reduce budgets (the disagreement 'only' being over how quickly these budgets should be cut). The second disagreement over the depth of the cuts has not proven to be as divisive as might be expected, with more discord expressed over speed and focus. The final disagreement - over what exactly is to be cut – has tended to revolve around loss of employment. Where voluntary early retirement and other schemes to reduce the number of employees (e.g. not replacing vacant posts) do not achieve the desired savings, then there is greater potential for conflict as workers and the labour movement campaign to avoid enforced redundancy. There is less focus on from where these jobs are to be lost within organisations (transport, social work, education leisure, etc.). The only preference that seems to be expressed is that jobs should be 'administrative' or 'managerial' and not customer-facing.

Bubbling up from beneath the surface and emerging from the margins of debate is a growing concern to recognise, evidence, and take cognisance of, the impact of reduced public sector budgets on the lives of the most vulnerable. Poverty sensitive budgeting is a fledging idea in these challenging times that seeks tools and processes to complement financial considerations in the decision making process. The mindset of poverty sensitive budgeting is that the cuts must also be designed in a way that minimises the negative impact on the quality of life of those who are least able to absorb them. It is the prospect of developing poverty sensitive budgeting that brought together the authors to work together as an Action Learning Set for six months from November 2010 to March 2011. Included in this document are our main messages, a summary of the general conclusions drawn by the group under four sub-headings, brief summaries of the wider work of group members, and directions to resources that group members have found to be useful in developing their ideas.

We hope that this report serves to stimulate interest, and to inform best practice, among those concerned to promote poverty sensitive budgeting in Scotland.

Summary of main messages

Impact of change on current challenges

- **Opportunity for anti-poverty activity**. Heightened concern over the impact on the most vulnerable of public sector adjustments may inadvertently raise the profile and importance of local anti-poverty work.

- **Change is more than changing budgets.** Poverty is dynamic and local regeneration practitioners need to be aware of the ever-changing nature of the local poverty.

- **Demand for services** may be rising at a time when there is pressure to scale back provision. There has never been a more important time to focus on poverty.

Impact of change on working practices

- **Uneven and unfinished impact**. Workforce change and public sector restructuring persist as live issues as much of the contraction has not yet been achieved. Similarly, the way in which job loss is being achieved varies across local authorities. There is a current and ongoing need to monitor the immediate and emerging impacts of these changes.

- **Changing nature of local government levers over anti-poverty activity.** If there is a contraction of direct service provision by local government, this need not (and should not) absolve it of responsibility for monitoring poverty impacts if it retains control over the terms and conditions of sub-contractors and consultancies.

- **Opportunity and rationale to extend interest in and focus on poverty analysis within local government.** The scale of 'workforce change' opens up an opportunity for regeneration practitioners to engage and work with, for example, HR in appraising local area impact.

Better measures of social impact

- **Estimating poverty impact is challenging**. A series of challenges must be overcome if robust data interpretation and appropriate service recommendations are to be drawn from poverty analysis. This requires local practitioners with an expert knowledge and understanding of poverty in Scotland. Also, planners need to find ways to capture and share both quantitative and qualitative data – the stories and the statistics.

- **Focus on internal poverty policy conflicts.** A cross organisational and multi-agency focus to identify instances where some interventions make it more difficult for other objectives to be achieved (e.g. withdrawing childcare services making it more difficult for mothers of young children to access the labour market) would be a fruitful approach to increasing the likelihood of achieving higher order objectives – such as tackling poverty.

- **Do not divert resources away from those living just above the poverty line**. It would be counterproductive if poverty impact analysis led to resources being diverted away from those who are currently managing – with the assistance of local service provision – to live above the poverty line.

- **The total impact of workforce change must be appraised.** The impact of workforce change must not be reduced to a financial budget analysis. If lessons are to be learned, then there is a need for a holistic appraisal to understand the wider impact on individuals, service provision and communities.

Influencing decision-making

- **Poverty impact analysis can be taken to the heart of organisational decision-making.** There is scope for presenting poverty impact analysis in a manner that would enable senior management to factor this into strategic decision-making.

- **There is scope to harness shared interests in tackling poverty**. There are many officers in large organisations with a service delivery focus whose work is directly involved in tackling poverty or dealing with its consequences. The current climate of uncertainty and the prospect of public sector restructuring may present an opportunity to promote the common interest in tackling poverty locally.

- **A grassroots focus promoting more effective local practice could lend weight to further support for anti-poverty work**. Utilising existing resources more effectively can demonstrate the value of anti-poverty work. Despite considerable pressures on resources, there are persuasive voices which argue for a shared coherent, consistent focus on reducing inequalities – including anti-poverty work.

1. How we went about it

Action learning' provides the time and the space to reflect on practice in a supportive peer environment, learn from the experience of others and deliver new solutions to current problems and challenges. Its basic philosophy is that the most effective learning takes place when we are faced with a real problem to solve.

Eight regeneration practitioners had their application to join the Action Learning Set approved in the Autumn of 2010. Members were accepted on account of their direct involvement, and/or active interest, in developing poverty sensitive budgeting in their respective organisations.

The group met five times from November 2010 to March 2011. Meetings were a mix of open forums on matters of common interest and focused presentation and discussion revolving around the work of individual members. The approach was to generate a collegiate environment in which members were comfortable discussing the challenges that they were facing in developing effective regeneration practice.

To find out more about the theory behind action learning click here.

2. What we learned

Introduction

The learning we generated is summarised under four thematic headings. Together, the first two themes are a commentary on the impact of the wider changes that are being experienced at the current time in the public and Third Sectors as a result of attempts to reduce the budgets of the local public sector. The final two themes are more direct reflections on the prospects for using poverty sensitive budgeting to inform local decision-making. The four themes that follow are,

- Impact of change on current challenges
- Impact of change on working practices
- Better measures of social impact
- Influencing decision-making

1. Impact of change on current challenges

Poverty impacts on the lives of people it touches in many ways. It may be expressed in terms of poor housing, challenges in making ends meet (and dealing with unforeseen crises/expenses) on limited budgets and in a general sense of impoverishment that is expressed physically in the built environment and less tangibly in the quality of community life.

The multi-dimensionality of the problems associated with poverty means that there are many possible points of entry for local service providers to tackle problems arising from living in poverty. Indeed, it might be argued that in recent years, anti-poverty strategies have been somewhat overshadowed locally by headline foci on community planning and financial inclusion. Although this is not inherently problematic (e.g. financial inclusion is worth promoting and Renfrewshire's current anti-poverty strategy emerged from its financial inclusion work), it is fair comment that there has been a lack of an overarching local anti-poverty focus in recent years. The adjustments that must be made in response to public sector restructuring may inadvertently present an opportunity for anti-poverty work to take a more prominent and central role in the core work of local public and Third sector organisations. The desirability of an overarching approach to tackling poverty locally is that a multi-dimensional assault on poverty is necessary to address the complexity and scale of the challenge; single-issue solutions (championed by individual departments or single issue Third Sector groups) cannot by themselves be expected to tackle poverty successfully.

There is a risk at the current time that 'change' is simply understood in terms of public sector restructuring. However, 'change' must also be understood as being an integral part of the regeneration challenge. Although the micro-geography of poverty may be persistent (a seemingly ever-present feature of some neighbourhoods), it is often dynamic (different neighbourhoods being more vulnerable to poverty at different points in time). Even when poverty is an enduring feature of the local area, it is also possible that the actual households who are experiencing poverty or the local 'poverty population profile' is changing at the same time. Similarly, 'change' has been evident over the last decade in the sense that the very poorest have not shared the same improvements in the standard of living that have been experienced by the wider population. Thus, poverty is dynamic and regeneration practitioners need to be attuned to the changing nature of poverty in place.

There is also the paradox that public sector restructuring may create additional demand for some of the very services that are being scaled back and under threat. For example, advice and housing services may face increasing demands as the economic downturn and welfare reform bites, and, local leisure and volunteering services may also find demands increase as the recently (and prematurely) retired and newly unemployed search for gainful ways to use the time now at their disposal. There is a clear need to factor as-yet uncharted service demands in decision-making processes over service capacity and staffing.

2. Impact of change on working practices

Although the challenges being faced at the current time are common across the public and Third Sectors, subtly different responses are being implemented in response. For example, although both attempting to reduce staff costs, Glasgow has targeted a reduction in the number of workers aged 50 and over, while others have set specific departmental targets. This opens up the need for debate on what is the least regressive means of implementing budget cuts; more specifically, this opens up space for a poverty-informed decision-making.

The scale of projected job losses has not yet materialised across all local authorities in Scotland, for example, in Fife considerably fewer jobs were lost in 2010/11 than was originally envisaged. This should not, however, be taken as grounds for complacency; the prospect of further incremental job losses over the next few years is a prospect that must be considered in those authorities whose budgets have been reduced least by staff changes at this period at the onset of the cuts. Neither is there room for complacency if the evidence shows (as it does in Fife) that proportionately more job losses are at senior/middle management level. Rather, there is a need to systematically analyse the impact of restructuring on service demands, the prospects for career progression and the longer-term value of public sector wages.

If, as is envisaged by some within the UK Lib-Con coalition, the public sector contracts and the Third Sector expands to address need, then this need not imply that the public sector loses a lever of influence over progressive service delivery. On the contrary, changes to the modus operandi of local government may imply that impact on poverty is less through

direct service provision, and more through specification via third party agencies contracted by Councils to deliver services. Poverty informed decision-making may pertain to what is required of others, rather than oneself.

Particularly within the context of Community Planning Partnerships, the impacts of principled Local Authority leadership around agency attitudes to, and action on, poverty could be considerable.

There are also opportunities, internal to local government, that these changing times make possible. Human Resources have traditionally been viewed as a Council service apart from the outward-facing focus of mainstream departments. However, given the heightened interest at the current time of the impact of public sector restructuring on both the organisations and the communities they serve, it is an opportune moment for HR to more closely align some of its work with the outward-facing service providing responsibilities of local government. For example, given the scale of workforce changes, there is a possibility for HR (on behalf of Councils) to take responsibility for considering the wider impact (positive and negative) of those staff leaving the Council employ. This contribution could extend to a poverty-impact focus, i.e. appraising the wider impact of 'workforce change' decisions.

3. Better measures of social impact

Introducing poverty sensitive budgeting will still involve grappling with many of the challenges that are present to any analyst tasked with understanding poverty in Scotland. Three examples are used to demonstrate the scale of the challenge that this presents. First, in many parts of Scotland, sustained efforts to tackle poverty and to regenerate communities means that a range of strategies, often similar in focus, has been used over the years. It is not yet fully understood the point at which policy impacts on people and place. In evaluating current policy in areas where a range of interventions have been introduced over time, there is the possibility that change may reflect approaches that have since been withdrawn, e.g. the full benefits of Social Inclusion Partnerships may only now be beginning to emerge. Second, and more generally, although there is often local commitment to tackle poverty and an underlying appreciation of the nature of poverty and the negative impacts it creates, there remains some uncertainty over what indicators and measures should be used to estimate and monitor change in levels of local poverty. There

is a need for clearer guidance on what constitutes robust and effective data on local poverty. Finally, taking account of poverty adds a layer of complexity and challenge to decision-making. This should be embraced as its contribution can avoid erroneous or regressive decisions over service provision being taken. For example, raw data on library use may suggest that service demand is higher in more affluent catchment areas; however, poverty sensitive decision making may factor in the possibility that a lower level of use in a less affluent catchment area might actually constitute a higher relative level of service uptake (than what might have been expected) or be more important in terms of access, opportunity and outcomes associated with learning and capacity building. Any decision to withdraw the service from this particular less affluent catchment area may risk losing a local success story. Clearly, there is a need for expertise, knowledge, skill and sensitivity among those tasked with taking account of poverty-related factors in decision-making.

A sharper shared analysis of the complex and dynamic relationships between the causes of poverty and its effects, or between enduring and transient poverty is urgently needed.

It is important to acknowledge that poverty analysis need not -and should not – be limited to the number crunching of figures from the sanctuary of the analyst's office. Clearly, there is a challenge to be faced in making statistics more reader-friendly. There is also a role for creative approaches, which may have an important complementary role in better understanding and better communicating the significance of local poverty. Experience has shown, for example, that impressionist field visits can play a role in enhancing appreciation of local area change (understanding) and forum theatre presentation has been used as an effective way to evidence the scale of the problem (communication). Field based work brings the analyst closer to people and communities' experiencing poverty, although there is a need to guard against anti-poverty work being understood to be research; research is a means to an end, and not an end in itself.

Involving people with experience of poverty in developing a broader understanding of and devising actions on poverty can itself be a powerful emancipatory approach.

Poverty sensitive decision-making can assist an organisation to ensure that it is making more effective use of the resources at its disposal (where effective use is defined as socially progressive or effective social protection). This may be internal to a department

(decisions over how departmental resources are to be allocated) or may be across the organisation (departmental share of the budget). Clearly, this has the potential to generate conflict within an organisation and robust decision-making processes and principles need to be established to ensure that this is managed. On the other hand, there is an instance when conflict should be encouraged as the focus of poverty appraisal. That is, a focus on poverty policy conflicts may be a helpful way to focus attention at a more strategic level, i.e. where introducing a policy in area X makes it more difficult to achieve success in area Y. For example, where withdrawing transport subsidy leads to loss of service which could make it more difficult for lower income households to access work further afield.

The focus on poverty impact analysis is to ensure that the most vulnerable are either least affected by loss of provision, or that they benefit most from service provision. However, an overly restrictive focus in which the most vulnerable is understood only to be those currently experiencing poverty may not necessarily be the most productive or sustainable approach to tackling poverty. There is a need to avoid overlooking (and perhaps even diverting resources away from) populations at the margins of poverty/deprivation – poverty sensitive budgeting must not imply directing all resources to tackle current incidence of poverty. Such an approach may inadvertently increase the vulnerability to poverty of those living just above the poverty line (and for whom local service provision is a vital resource in guarding against it). An appropriate and dynamic understanding of the interplay between tackling current poverty and preventing future poverty must be developed.

There is a need for a comprehensive appraisal of the impact of workforce change. Such an appraisal would be open to the possibility that some positive benefits may accrue from workforce change. For example, additional productive capacity for informal/voluntary support (delivered to those experiencing poverty) may be created by those withdrawing from the labour market as a result of workforce change. Fresh ways of thinking about workforce change may also extend to acknowledging that it may have an impact beyond the local area. There may be a need for regional collaborations across local authorities where commuting patterns are such that there is significant traffic across local authority areas. However, it is likely that the primary focus of workforce change analysis will be ascertaining the negative impact on people and places. There is a need to challenge the formal appraisal of the impact of some posts that have been relinquished as having 'no impact on service'. Although this may be understandable in the sense of justifying decision-making, it is also improbable (at some level, capacity is reduced, perhaps

indirectly due to workload reallocation and the more restricted capacity of staff remaining) lacking credibility and demeaning to local public service provision as a whole. More generally, there is a need to appraise the totality of the impact (good, bad and indifferent) of redundancy and voluntary early retirement on people and communities.

4. Influencing decision-making

Leadership and senior management commitment to tackling poverty is central to success. Poverty will not be tackled effectively if it is viewed as the preserve of regeneration practitioners alone. The ideal would be to establish a whole organisation commitment to tackling poverty in which anti-poverty practice is a 'central purpose' that is embedded throughout the work and culture of the organisation and its constituent parts.

Whilst Public Agencies and Community Planning Partnerships often cite 'reducing inequalities' as a 'high-level' ambition, culture change is required, both to develop a deeper understanding of what is needed and to broaden shared commitments to reducing inequalities.

Senior management is far from averse to tackling poverty locally, although to engage them must involve the delivery of exactly what they require in order to progress anti-poverty work. Particularly valuable is the presentation of a business case for tackling poverty; in the current system, this may involve the articulation of anti-poverty action in terms of financial gain and achievable Single Outcome Agreement deliverables. The realities of senior management must also be appreciated. It may prove necessary to restrict the wider availability of poverty impact analysis to senior management in order to assure a full and frank appraisal. Otherwise, the potential disclosure of 'bad news' stories and unpalatable decisions may be a strong disincentive to even consider, let alone introduce, poverty sensitive decision-making.

Influence can also be achieved beyond senior management level. The possibility of adapting EQIA (Equalities Impact Assessment) or EMF (Equalities Measurement Framework) to accommodate poverty impact analysis as a routine aspect of service and policy appraisal is worthy of consideration. Where EQIA is viewed as a valuable contribution to policy appraisal (and not merely an administrative exercise that must be completed), then this may be a route worth pursuing. Poverty Champions (elected

members who take responsibility for promoting anti-poverty work throughout the Council) or Corporate Poverty Planning Groups have also been considered as ways to lobby for greater consideration of poverty impact analysis in larger organisations, such as local authorities.

There are also opportunities for more effective grassroots interventions within larger organisations. More effective working practices inadvertently add weight to the case for further action to tackle poverty (success breeding success). As has been noted already in this paper, there are undoubtedly 'allies' to be found for tackling poverty at this time, particularly from those services which are likely to be hard hit if there is a significant loss of staff. Beyond this, it is worth considering how poverty intelligence can be used to its' fullest effect. For example, Human Resources has the potential to identify low income earners in their organisation and could use this intelligence to direct advice services to provide them with targeted advice of tax credits and other benefits.

Clearly a balance has to be struck over, and cognisance must be taken of, the realities of increasing workload and pressures among public sector staff. While there is demonstrable benefit in encouraging an organisation's stakeholders to embrace poverty impact analysis as a means to achieve more effective interventions and promote a strong collective sense of purpose, there is a need to be realistic as to the capacity that is available. There is also a need to work within the strictures of the current system to ensure that realistic targets are set.

5. Concluding points

There are grounds for some cautious optimism over the prospects for poverty sensitive budgeting in the years' ahead. The success of fledgling initiatives, such as those described in this paper, and the particular challenges of public sector restructuring make it more likely that poverty-related decisions will be closer to the heart of decision-making in the next few years.

It is important, however, that anti-poverty work is not viewed as being little more than crisis management, as this may imply that poverty sensitive budgeting is an approach that could be foregone when less challenging times are once again reached. Another risk is that anti-poverty work – including budgeting initiatives – is introduced as little more than

'promotional' work to evidence that 'something is being done'. While it is true that the current climate presents opportunities for anti-poverty work, it is important that these powerful contributions to promoting local social justice are both for the here-and-now and for the years' ahead.

3. Reflections on learning

The group was asked a range of questions to evaluate how they found the action learning set experience and what they felt they had gained from it. A selection of their responses are set out below.

"There's a real danger that policy officers keep their head down and try to come up with distinctively local solutions without capturing the innovative ideas and practice that can be found across Scotland. The learning set was a great way to learn about the way that others have tackled the same challenges, chew over some things you are trying out and also, (it must be said) have a bit of a moan. Or was that just me?"
ALS participant

What you have learned?

- I've learned about the different key issues in tackling poverty in other areas, looking at similar issues from a different perspective and considering other poverty priorities than the focus we currently have. That there are similar issues and challenges in other Local Authorities, with a willingness to support each other to address and benefit from other experiences.

- The Action Learning Set has been a very positive experience for me. I valued the opportunity to hear from very well-informed colleagues from outwith the Third Sector. I found it stimulating and encouraging that colleagues were committed to engaging in an open and honest way around issues which can be quite controversial.

- A lot more about other areas' approaches; stages of development; their challenges and how they are being tackled. My subject knowledge of poverty issues has also increased through the group sign-posting literature and good practice, research/ academic input from John and through reading for the learning set. This has been particularly valuable to me as I am new to my post and new to this (specific) area of policy.

How you have learned?

- Listening to others, learning about their approaches and experience of researching, implementing and delivering. I've valued the Action Learning Set's ability to provide 'time-out' to consider and discuss poverty issues and approaches, giving the space to look at the wider strategic issues and other Local Authority approaches. I've learned through the active involvement of other Action Learning Set members - who have been great members, willing to share information and discuss issues openly.

- Through frank discussion and (friendly) critical analyses. I valued the opportunity to 'test' ideas, which were not yet fully formed.

- Learned most through discussion and exchange of views with the group; in particular through the opportunity to examine particular issues in detail through discussion and questioning.

What have you taken from your set, back to your workplace, and what impact has this had on your practice?

- Quite a few ideas and some good contacts.

- Been able to synthesise the results of broad and early discussions we were having locally around a poverty framework, with research and knowledge of practice from elsewhere to start to plot out a way forward.

- I've quickly implemented our Corporate Management Team's decision to include poverty as an equality strand within our corporate Equality Impact Assessment

- This has been something of a challenge, as not everyone in the Sector sees tackling poverty as their core business. That said, I was able to share much of my learning with colleagues who are determinedly and explicitly engaged with the need to mainstream a shared understanding of and approach to tackling inequalities.

- I am now better able to promote the 'Action Learning' approach to colleagues within my organisation and within the Third Sector.

What impact has that had on you?

- Increased confidence in my new role; the learning set has been a source of 'fast track' learning for me.

- Confidence with Organisational Development colleagues in introducing poverty into our Equality Impact Assessment toolkit, time-out to consider my approach and make me think outwith my own local priorities....overall, I feel that the Action Learning Set has provided some timely and needed encouragement.

- Positive, encouraging.

What impact has that had on your colleagues?

- This is difficult to gauge, but I suspect that bringing a 'broader' understanding to the task has helped deepen (some of) my colleagues' understanding of the issues behind action to tackle poverty.
- Hope this will develop with time as the approach we are testing out develops. Initial reactions from senior management and elected members has been very positive however. We are considering setting up an online community of practice for our anti-poverty working group so we can communicate material more widely.

Barriers to learning?

- The pressure on time back in the office meant that working in between meetings was difficult and meant I did not use the Communities of Practice site. Although I would have like to have continued the Action Learning Set further to examine our four key themes with some recommendations.
- Time has been a significant constraint.
- I have failed (twice) to use video-conferencing/skype to participate in the action learning set without spending time travelling. This has been frustrating. Having said that, both Heather and John have always been willing to speak to me outwith the meetings, and I have found their support invaluable.
- Time is always an issue and it took some juggling to be able to attend all the meetings. It would have been good to have the luxury to follow up ideas from the group in more detail but accept you have to compromise on this!
- The style of learning supported by the group did suit me so no real barriers in that sense.

4. About our everyday work

4.1 Peter Allan (Dundee City Council)

Peter described how Dundee CC is working towards the considerations of poverty implications of funding decisions as a crucial dimension of equality impact assessments. To achieve this effectively requires a clear understanding of who is in poverty, where they live and the range of factors which will affect their poverty. Local discussion has covered how universal changes to service provision or charging can disproportionately impact on those on low incomes in unanticipated ways. While not an exercise in "poverty proofing", the process can inform decisions around savings and encourage the identification of mitigating action. Discussion at the learning set explored the political challenge of emphasising pro-poor policies and the contemporary "fairness" agenda with its potentially stigmatising consequences. A clear political and partnership commitment to challenging income inequalities can create the context in a single outcome agreement where closing the gap can become a collective local priority

4.2 James Arnott (Glasgow City Council)

James described the work of GCC in systematically analysing the Scottish Index of Multiple Deprivation (SIMD) data for the city of Glasgow. Although there are pockets of persistent area deprivation, Glasgow has seen a significant reduction in the proportion of datazones that are multiply deprived. The aim of the analysis is to better understand why some areas are moving out of deprivation and clarify the role service delivery has had in assisting this transition. More critically, the task is to ensure the areas that have reduced deprivation maintain their position and do not fall back into deprivation, while at the same time ensuring that areas of persistent deprivation also maintain their current level of services. The SIMD work has also been brought into the wider context of urban change over the last 20-25 years, and more specifically why some areas have moved out of deprivation while others of a similar socio-economic and demographic structure have not changed in a similar way. This highlights the need to better understand areas via site visits and meetings with local groups and residents, and in working out the interplay between areas so they are not seen in isolation but as part of a constantly changing environment. This also means we have to see the city as part of a wider conurbation and

to address concerns that areas in Glasgow may be gaining at the expense of other areas on the periphery of the conurbation.

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4.3 Milind Kolhatkar (Edinburgh Voluntary Organisations Council)

Milind described his interest in developing an understanding of two linked issues: the need to adequately articulate the worth and the impact of Third Sector activity in Edinburgh; and the desire to complement existing evidence on material deprivation or wealth with illuminating information on individual and community well-being.

Milind works with EVOC (Edinburgh Voluntary Organisations' Council) to enable and support Third Sector participation in Community Planning at a city-wide and neighbourhood level. A key element of his work is to support the Edinburgh Compact Partnership, a 'Strategic Partnership' with responsibility for tackling inequalities on behalf of the city's Community Planning Partnership.

With a stated intention to 'mainstream a Social Value approach' via activities which are 'inclusive, citizen-led, empowering and creative,' Edinburgh Compact Partners are keen to develop appropriate mechanisms for capturing Social Value across Edinburgh. It is hoped that this sharper understanding would help partners create conditions within which communities can take action to yield 'the good Society.'

To this end Milind chose to bring to the Action Learning Set a set of queries around Social Value, Individual and Community Well-Being, and the linked-but-distinct roles of the Third Sector, Local Governments and Community Planning Partnerships to build a more equal Edinburgh.

4.4 Christine MacLean (Stirling Council)

Christine described the work of Stirling Council and CPP in developing an approach to tackling poverty that is embedded in the CPP' s economic strategy. Of particular concern in Stirling is the scale of income inequality. Developing data suggests that the gap between the median household income and the mean household income is higher in Stirling than it is in any other local authority in Scotland

We are currently exploring a poverty proofing approach, with a number of potential components, including:

- Adoption of a policy statement, around tackling poverty being at the heart of achieving improved outcomes.

- Making a commitment to tackling poverty and deprivation within mainstream budgets

- Mapping and evaluating our existing approaches to more fully understand the extent of our effort to tackle causes and mitigate impacts. For key 'poverty risk factors', we aim to: confirm the negative outcomes, who is most affected and the evidence we have; evaluate our preventative and reactive services, and; establish what more we need to know about these factors.

- Maintaining a live poverty and deprivation data profile

- A programme of awareness raising across the Council and the Partnership about: the picture of poverty and deprivation in the area; the complex nature of poverty & deprivation; how this has a negative impact on the whole area, and; the role and responsibility of politicians, agencies and services in decision-making.

- Further development of socio-economic factors within our EQIA process including additional guidance. We could also discuss a similar process with our partners.

- Adoption of a poverty/ socio-economic screening tool for the Council budget, change programme worksteams and other major programmes. We could also consider developing this further with partners to alleviate potential multiple impacts. The screening tool would take account of geography, household group and risk factors and identify poverty implications and mitigating action.

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4.5 Pamela Rennie (Renfrewshire Council)

Pamela described the work involved in implementing and developing the anti-poverty strategy in Renfrewshire Council, within the context of welfare changes and the local focus on more strategic advice services. The Renfrewshire Anti-Poverty Strategy was agreed by Renfrewshire Community Planning Partnership in September 2009. In November 2010, Renfrewshire initiated a programme of work to provide an updated overview of poverty in Renfrewshire and identify forward plans to maintain a strategic focus upon poverty to achieve better outcomes. The strength of the response required was evidenced by the SIMD 2010 Update, the Scottish Local Government Forum Against Poverty welfare reform

analysis, and Save the Children's Museum of Poverty workshops – suggesting that poverty in Renfrewshire is worsening and welfare reform is likely to exacerbate poverty for the most vulnerable individuals and families. There are three key workstreams currently being progressed to enhance the approach to tackling poverty in Renfrewshire; an ongoing commitment to practical advice programmes, more strategic approaches to advice service provision and policy planning, and development of early intervention initiatives and practices. This will include; continued funding of Renfrewshire's 5 Credit Crunch projects, implementation of a common Management Information System for advice services, inclusion of poverty within the corporate Equality Impact Assessment toolkit, undertaking a comprehensive Renfrewshire Impact Assessment of welfare changes and reform, and promotion of early intervention approaches. The challenges and issues raised with the Action Learning Set included; the balance required to address short term responses (for example to welfare reform) while maintaining a strategic focus on outcomes, the challenges in developing poverty intelligence and profiles, ability to strengthen partnership commitment and championing of poverty (a cross-cutting theme where no one Community Planning Partnership has a lead organisational responsibility), and the ability to listen and respond to those in poverty (an evidence, participation, and change approach).

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4.6 John McKendrick (Glasgow Caledonian University)

John is a Senior Lecturer in the Department of Social Sciences at Glasgow Caledonian University. From 2009 to 2011, the Scottish Centre for Regeneration contracted him to provide expert support to the Community Regeneration and Tackling Poverty Learning Network. 'Poverty sensitive budgeting and decision-making' was one of the key topic areas for which support was provided. In addition to supporting the work of this Action Learning Set, John convened a workshop for practitioners, authored a Learning Point on the local prospects for poverty informed decision making and authored a longer report on the broader prospects for developing this work in Scotland.

The support provided to the learning network also resulted in John writing Learning Points on 'involving children and young people as active research participants in community regeneration', 'writing and talking of poverty', 'tackling poverty in local areas' and 'poverty profiling' (all of which can be downloaded free of charge from the Learning Network's web pages).

This work is typical of John's approach to the study of poverty. He is primarily concerned to use his understanding of the issues to inform the work of practitioners and campaigners beyond the academy who seek to tackle poverty in Scotland, the UK and the EU. Recently, he co-edited Poverty in Scotland 2011 (CPAG). He also co-authored reports for the Joseph Rowntree Foundation on 'Media, poverty and public opinion in the UK' in 2008 and 'Child poverty in Scotland: the next steps' in 2009.

Further information on John's work can be found by visiting, http://www.gcu.ac.uk/lss/contactus/ourpeople/drjohnhollandmckendrick/

Anne Feeney (then, Financial Inclusion Strategic Champion Scotland), Chris Gardiner (then of Fife Council) and Rebecca Spillane (East Lothian Council) were also members of the Action Learning Set.

5. Sources of further information

3.1. Happiness

- Happy Planet Index

http://www.happyplanetindex.org/

- Health and Wellbeing Study on happiness!

www.trackingstudy.co.uk/happier.html

- Genuine Progress Index (Canada)

http://www.gpiatlantic.org/

- Balancing Act (Australia)

http://www.csiro.au/resources/BalancingAct.html

http://en.wikipedia.org/wiki/Triple_bottom_line

- Bhutan

http://bhutanakingdomofhappiness.com/

- Oxfam Project

http://www.oxfam.org.uk/applications/blogs/scotland/Oxfam%20Scotland's%2020 11%20Scottish%20Parliamentary%20Election%20Manifesto%20(3).pdf

Note that this link is only to a brief mention in their Manifesto briefing of the on-going work in this area.

- Index of Sustainable Economic Welfare (New Economics Foundation)

http://www.healthscotland.com/uploads/documents/7402-
An%20Index%20of%20Sustainable%20Economic%20Well-being%2008-06-23.pdf

- National Consultation (UK) on measuring well being

http://www.ons.gov.uk/about/consultations/measuring-national-well-being/index.html

3.2. Data Sources

- KnowFife Dataset

www.fifedirect.org.uk/knowfifedataset

- Scottish Index of Multiple Deprivation

http://www.scotland.gov.uk/Topics/Statistics/SIMD

- Scottish Schools Adolescent Lifestyle and Substance Use Survey (SALSUS)

http://www.drugmisuse.isdscotland.org/publications/abstracts/salsus.htm

- Scottish Health Survey

http://www.scotland.gov.uk/Topics/Statistics/Browse/Health/scottish-health-survey

3.3. Reading

Damon Gibbons' thoughts on financial inclusion

- http://www.fichampionsscotland.org.uk/mainsessions.html (see pdf link at bottom of page)
- Social Impact Bonds

http://en.wikipedia.org/wiki/Social_impact_bond

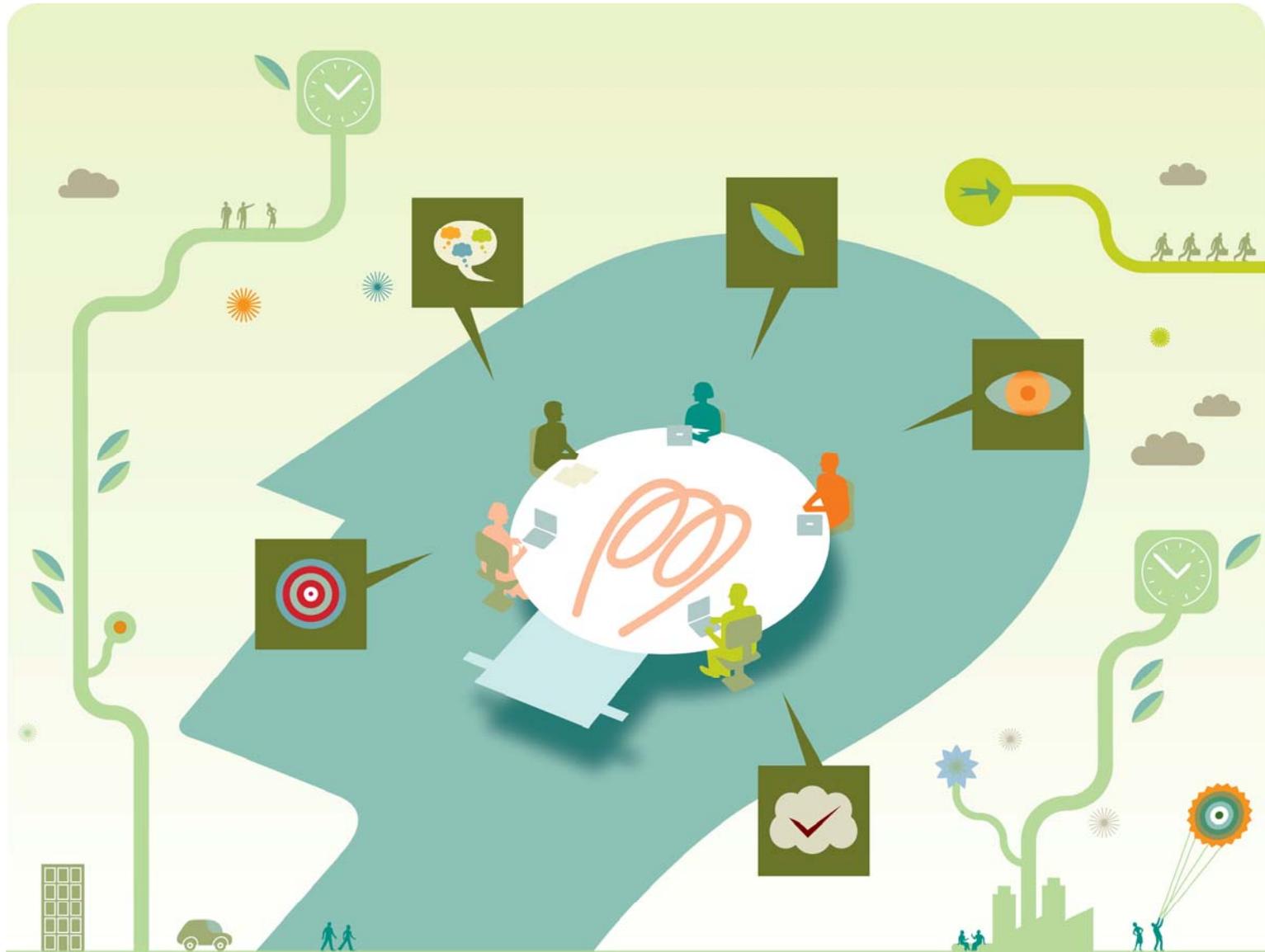**http://www.socialfinance.org.uk/**

- Amartya Sen

http://nobelprize.org/nobel_prizes/economics/laureates/1998/sen-autobio.html
http://en.wikipedia.org/wiki/Amartya_Sen

About the Learning Network

The action learning set was supported by the Community Regeneration and Tackling Poverty Learning Network. This network has now merged with the Employability network to form the Employability and Tackling Poverty Learning Network which is a cross-Government initiative that supports Community Planning Partnerships and their partners to improve employability and anti poverty practice throughout Scotland. The network gives practical help to organisations and individuals working at a local level.

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