

# OUTREACH GUIDE

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# OUTREACH

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Outreach is aimed at raising the profile of free and independent financial advice, generating conversations with older persons in their local community, and providing an avenue for seamless detection of risk of financial abuse and referral.

For services to be properly adapted, they must be based on locally adapted communication styles (Louth, 2018). This takes ‘...time and patience...’ and ‘...can’t be a top down approach.’ (Louth, 2018)

**Because they are the experts in their local communities, service partners will develop their own outreach models.**

‘...doing good work comes from spending time with the community; this helps build trust and understanding. It is only then, when investment has been made in the capacity to learn from and work with community that efforts can be made to build capacity within community.’

(Louth, 2018)

# BEST PRACTICE PRINCIPLES

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The **Best Practice Principles** (Chapter 1) should be followed when planning and undertaking outreach. Some key points:

1

Outreach includes an established referral pathway with the National Seniors Financial Information Desk. Service partners are encouraged to build referral pathways with local networks.

2

Parachuting in fleetingly to a location or community gives an outreach service minimal chances to connect with people. Efforts should be made to ensure host organisations and people 'own' the service as part of their community.

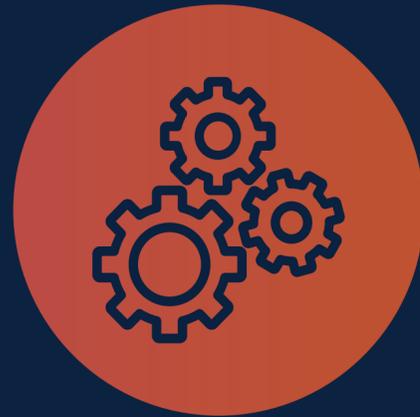
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Adopting a person-centred approach to outreach means that we should expect very few conversations with older persons to happen in the same way. We aim to be flexible to accommodate difference.

The Law and Justice Foundation *Review of Legal Aid NSW outreach legal services* (Forell, 2013) provided the framework for the Best Practice Principles.

# HOW TO CREATE AN OUTREACH MODEL

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Each service partner will need to create their own outreach model for delivery of the Financial Protections Service.



The *Outreach Scoping Survey* (Practice Manual, Appendix A) should be used to help create a locally adapted model.



See the outreach guide for guidance on undertaking the *Outreach Scoping Survey* (Chapter 3) on the use of conversation during outreach. (Chapter 4).

# PRELIMINARY POINTS:

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- Outreach comprises two stages: outreach services and in-house services.
- Outreach can include any service delivery by the service partner with the aim of making the Financial Protections Service more accessible to potential service users (Pleasence, 2014).
- Service partners can deliver the Financial Protections Service in conjunction with existing outreach services, or create new outreach opportunities.
- In-house services are provided within usual service partner operations. Once a service user is referred in-house they should become a client of the service partner.

# PRELIMINARY POINTS:

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- In deciding on the outreach model, consideration must be given to screening.
- Taking into account the diverse models of outreach that are available, it is expected that:
  - a) only informal screening will occur during outreach
  - b) formal screening will only occur after the service user has become a client of the service partner, most likely during in-house services.
- Each service partner will need to create their own outreach model for delivery of the Financial Protections Service. The *Outreach Scoping Survey* (Practice Manual, Appendix A) can be used to determine the best outreach model.

# NEEDS AND SERVICE GAP ANALYSIS

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## STEP 1: SURVEYING NEED IN THE SERVICE AREA

### SURVEY EXAMPLE

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**Briefly explain the existing scope, services and geographical area covered by your organisation as provided to older persons in the community (e.g. in what ways does your service already access and meet the needs of older persons in your community).**

Helpful Legal Centre is based in Greenfield, Brisbane. We provide outreach services at a local library one Monday a month. This outreach service is aimed at providing information on advance care planning. All other services are provided in house.

**What do you view as the particular needs and characteristics of older persons in your area? For example:**

- are there any local factors you feel need to be considered when delivering outreach?
- are there any specific considerations for Culturally and Linguistically Diverse communities, those with Aboriginal and Torres Strait Islander heritage and members of LGBTIQ+ communities?

- what do you know about the socio-economic needs of older persons in your local community?
- overall, what do you view is the broad picture of older persons in your community and levels of socio-economic need?

Greenfield has a vibrant and diverse community of primarily lower socio-economic residents. The Greenfield General Hospital Dialysis Unit is based locally, and since the unit was opened 10 years ago, there has been a growing number of older persons, notably those from Aboriginal and Torres Strait Islander heritage, moving into the area.

**If relevant, are you aware of any supporting information (i.e. Census, SEIFA data) that may give you a clearer picture of the older person demographic in your local area?**

The 2016 Census data shows that Greenfield is a disadvantaged suburb with high numbers of early retirees.

# NEEDS AND SERVICE GAP ANALYSIS

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## STEP 2: IDENTIFYING EXISTING SERVICES

### SURVEY EXAMPLE

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**Do you provide financial counselling, legal advice or social work services in-house? If so, please indicate.**

The Helpful Legal Centre provides legal advice and social work services in house.

**If you do not provide financial counselling, legal advice or social work services in house, do you:**

- **feel you have a clear picture of existing free and independent services in your area?**
- **maintain an internal list or database of these services, for ease of access during outreach?**

We have a good idea of existing free and independent services in Greenfield. Our lawyers and social workers regularly attend QLAF interagency meetings, and a number are on the boards of local community organisations and have strong relationships with older persons networks such as OPAN.

**Can you readily identify key financial counselling (including capability and resilience workers), free legal and social work organisations who could be effective contact points for warm local referrals? If not, explain how you intend to identify these services.**

We have a referral relationship with the Beneficial Financial Counselling service, which employs both financial counsellors and resilience workers.

**If you do not employ a social worker in house, can you identify social support referrals in your local community (i.e. services that can assist older persons to feel included in the community, access information and services and protect against social isolation).**

Our in-house social workers have existing knowledge of social supports available in the local area.

# NEEDS AND SERVICE GAP ANALYSIS

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## STEP 3: FEASIBILITY

### SURVEY EXAMPLE

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Please set out, with reference to funding allocated, what resource and staffing arrangements you plan to have in place for undertaking outreach and in-house services, including:

- (a) the amount of staff hours you expect to allocate to outreach and in-house service provision (e.g. 5 hrs per week doing outreach, 1 hr per week conducting in-house services)
- (b) any other resourcing costs you anticipate will need to be covered by the funding budget (e.g. printing outreach materials, outreach location costs, travel costs).

Based on the funding figures, we expect to fund an outreach worker for 5 hours per fortnight to conduct outreach services, and 3 hours per fortnight for in-house services. Because we have an existing outreach service, we do not expect any additional costs aside from printing outreach handouts (approximately \$200).

# IDENTIFYING THE PURPOSE OF OUTREACH

Document how the proposed outreach model meets the Financial Protections Service purposes:

<b>WHO</b>	Outreach should be aimed at older persons in the local community.
<b>WHEN</b>	Outreach may be provided: <ul style="list-style-type: none"><li>(a) 'just in case' to identify teachable moments and proactive action areas for financial decision making and introduce</li><li>(b) 'just in time' to identify the need for financial, legal and social support to prevent problems and encourage help seeking when problems do arise (Forell, 2015).</li></ul>
<b>INTENT</b>	The intention of outreach is to connect older person to the Financial Protections Service.
<b>OUTCOME</b>	The intention of outreach is to connect older person to the Financial Protections Service.

## SURVEY EXAMPLE

Our outreach service will be aimed at older persons transitioning from the Greenfield General Hospital, and provided on a 'just in case' basis, to help them navigate financial decision making. The outreach will meet the Intent and outreach aims above.

## Community legal education and information at Legal Aid NSW: activities, costs and future planning



July 2015



LAW AND JUSTICE  
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## Identifying the purpose of CLEI: to whom, when and to what end

		<b>Who</b>		
		<b>Broader community</b>	<b>Core clients</b>	<b>Workers</b>
		<b>Higher capability</b>	<b>Lower capability</b>	<b>Problem noticers</b>
		<b>To do</b>	<b>Get help</b>	<b>Give help</b>
<b>When</b>	<b>Just in time</b>	<p>Procedural—to outline steps to take with current problem and provide tools to do so</p> <p>e.g. Divorce classes, Law Assist NSW <i>Is someone chasing you for money?</i></p> <p><i>* More scope for technology</i></p>	<p>To identify problems as legal, and introduce legal service for immediate help</p> <p>e.g. CLE provided by solicitors in outreach locations</p> <p><b>CLI to reinforce advice</b></p> <p><i>* Less scope for technology due to importance of relationship building</i></p>	<p>To educate problem noticers to recognise clients' existing legal issues and know where to refer client to legal help (including outreach)</p> <p>e.g. <b>Law Check-Up tool</b>, linked to outreach advice service</p> <p><i>* Mix of technology and face-to-face CLE</i></p>
	<b>Just in case</b>	<p>To encourage steps to prevent problems arising and encourage action when they occur</p> <p>e.g. Planning for later life decision-making, CLE on <b>Cyber bullying</b> for young people</p> <p><i>* More scope for technology</i></p>	<p>To identify problems as legal—to prevent problems and to encourage help seeking when problem arises</p> <p>e.g. <b>Let's talk</b> CLE package, delivered in migrant resource centres</p> <p><i>* Less scope for technology due to importance of relationship building</i></p>	<p>To build capacity to recognise issues and refer, across a range of issues, to assist current and future clients</p> <p>e.g. <b>Law for non-lawyers</b>, the webinar series</p> <p><i>* More scope for technology</i></p>
<b>Intent</b>		Provide <i>alternative</i> to legal assistance services	To <i>connect</i> isolated clients to legal assistance services	Provide a <i>pathway</i> to legal assistance services for clients
<b>Types of outcomes</b>		Users able to progress or resolve issues	Users seek assistance	Problem noticers provide appropriate referrals

# SELECTING AN OUTREACH MODEL

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## SURVEY EXAMPLE

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**Will Financial Protections Service outreach be delivered in conjunction with existing outreach services? If so, explain the existing outreach service.**

Yes. We undertake a fortnightly social work outreach service at the Transition Care Program at the Greenfield General Hospital Dialysis Unit. The existing outreach service is aimed at facilitating accommodation and social support services to older persons transitioning from the Commonwealth Government funded Transition Care Program into the local community. It was created in conjunction with the hospital in 2016.

**Will the Financial Protections Service outreach be:**

- (a) **CLE outreach**
- (b) **face-to-face outreach**
- (c) **co-delivery outreach**
- (d) **Multi-Agency Clinic**
- (e) **mixed service delivery**
- (f) **other**

**Provide a brief overview of the proposed outreach model.**

The Financial Protections Service outreach model will be delivered in two stages.

**(a) CLE outreach**

Offered to staff of the Transition Care Program and Greenfield General Hospital Dialysis Unit. The purpose of CLE outreach will be to make staff aware of the Financial Protections Service, and of the key decisions older persons need to make when transitioning towards or during retirement. These staff will then become 'problem noticers' for older persons who can be referred to the outreach clinic. We expect to offer this CLE training approximately once every six months.

**(b) Face-to-face outreach**

Will then be offered during the existing outreach service, to hospital and community residents of the Transition Care Program and Greenfield General Hospital Dialysis Unit.

# DECIDING WHICH SCREENING PROCESS TO USE

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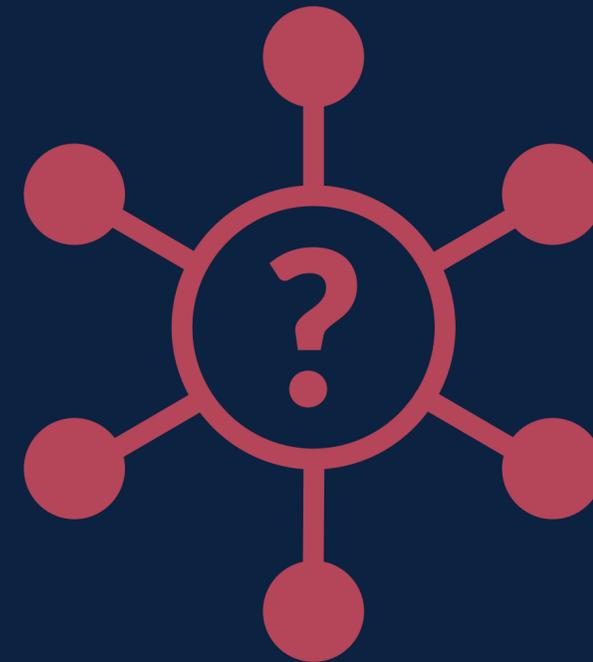
## SURVEY EXAMPLE

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Considering the outreach model and the following considerations do you expect to undertake informal screening or both informal and formal screening during outreach?

- The setting and what it dictates for best practice.
- The subject and what it dictates for best practice.
- The screening process itself and any inherent limitations.

Due to the lack of privacy at the location and the needs of our clients, many of which are strongly connected through local family and cultural communities, we have decided to only undertake informal screening during outreach. Where we suspect a risk of financial abuse, we will refer the older person in house for formal screening and facilitated referral.



# PLANNING THE LOCATION

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## SURVEY EXAMPLE

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**Describe the outreach location.**

- (a) Is it comfortable, familiar and trusted? (e.g. located at a venue where older persons feel comfortable)**

The existing outreach has been very successful in reaching socially isolated older persons, and we find older persons are very happy to have a chat.

- (b) If formal screening is going to be undertaken, is there private space for conversations?**

We will not undertake formal screening.

- (c) How has the safety of Service workers and Service Users been taken into account?**

We have an existing safety policies which will apply. We are also aware of Greenfield General Hospital safety policies.



# POLICIES & PROCEDURES

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## SURVEY EXAMPLE

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Does your Service have existing policies in the following areas that will cover the provision of outreach?

- Confidentiality
- WHS
- Safety of staff and service users
- Cultural competence / sensitivity
- Data security (i.e. In-house referral information)
- Providing services in the presence of third parties.

If not, what additional policies or practices do you expect to implement before commencing outreach?

Yes.



# PROMOTION

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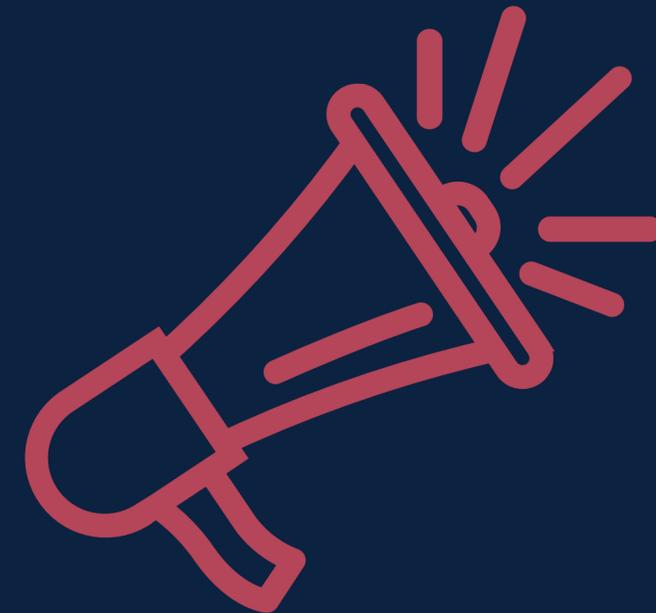
## SURVEY EXAMPLE

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**In order to promote the Financial Protections Service, has your service planned how you will contact, consult and collaborate (including through agreed warm referral processes) with the following key promotional pathways:**

- (a) Local community problem noticers,**
- (b) Host agencies (where relevant) and**
- (c) Key referral pathways.**

We plan to launch the service at the upcoming NAIDOC week celebrations at the Greenfield General Hospital. We have spoken to the Greenfield General Hospital, and we will attend the upcoming Transition Care Program and Dialysis Unit staff meetings to give them an overview of the service and arrange a suitable time for CLE training. Our social work student has emailed and called key local financial counselling, social support and other referral services to let them know about the service. A representative from Beneficial Financial Counselling Service is going to attend the launch.



# IT STARTS WITH A CONVERSATION

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## KEY POINTS

- Outreach conversations should be nuanced and subtle, and not explicitly discuss financial abuse.
- Older persons should be encouraged to undertake simple, doable behaviour such as contacting the Financial Information Desk when considering a particular decision.
- Service partners should take a person-centred approach.
- When deciding on and undertaking screening, the older person should be viewed as an individual in context.



Conversations, as a conduit of storytelling, sharing **personal perspectives, present circumstances** and **future aims**, are a central service delivery tool.