

**FALKIRK COUNCIL CORPORATE & NEIGHBOURHOOD SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING STATEMENT
2013/2014**

| | |
|----------------------|---------------------------------|
| Organisation Name | Falkirk Citizens Advice Bureaux |
| Project | Core Funding |
| Agreement Dates | 1 April 2013 - 31 March 2014 |
| Name of Lead Officer | Lesley MacArthur |

A OVERALL ORGANISATION AIMS

Summary of Key Aims & Objectives

The Citizens Advice Bureaux (CABx) are the largest independent voluntary sector providers of information and advice services in the Falkirk Council area. The CABx have a strong ethos to provide advice which is free of charge, confidential, impartial and independent. The information and advice is generalist but, in some areas such as debt advice, a specialist service is also provided. Advice provided includes welfare benefits (43%), money and debt advice (28%), employment (7%), housing (4%), Legal (4%), Relationships (3%), Financial Products (3%), utilities and communication (2%), and consumer issues (2%)

The CABx in the Falkirk Council area run as three independent bodies, each with their own Board of Management. The CABx collectively, have a staff resource of around 20, employed on a full and part time basis. The main focus for staff is to manage the service, provide specialist and complex advice and also to recruit, train and support volunteers. The CABx also work with between 60 - 80 volunteers at any given time.

Although there are 3 independent bureau with separate management committees and structures, the organisations work closely together on a range of issues for example volunteer recruitment, funding, marketing. Joint working is managed via a Joint Action Group, which has an appointed Chair and is attended by the Managers of each bureau, a member of each bureau board, CAS Advisor and Council Officer, as required. A Joint Strategic Plan has been developed (recently updated to 2014-2017) and incorporates the actions following recommendations of the Scrutiny Panel process undertaken in 2013.

It should be noted that although the CABx receive funds from Corporate & Neighbourhood and Social Work Services, the funds are used collectively by each bureau to achieve outcomes. Additional funds for the ASAP project are reported separately.

List of Agreed Outcomes

Although the Bureaux receive a number of strands of funding from the Council, they currently operate to a single key outcome, which is:

Every Citizen in the Falkirk Council area will have access to advice services which are adaptable to suit national reform and local interpretation, and ensures that no individual 'falls through the gaps'.

The single key outcome relates directly to the Falkirk Council Poverty Strategy, Towards a Fairer Falkirk. We expect the bureaux to consider the target groups and areas identified in the strategy and all the work that they do.

In achieving the overarching outcome, the CABx provide:

- A wide range of general and specialist advice is available from appropriately trained and qualified staff and volunteers.
- Outreach and community based services and activities are established and delivered in line with emerging need.

Why Service/Project is Funded Externally Rather than by the Council

The CABx provide a wide range of generalist and specialist services over and above the scope of current Council provision. In addition, the CABx offer individuals with choice by providing a means of advice which is independent from Council services, which is where for example, the housing or debt problem may be.

B ACTUAL PERFORMANCE vs. OBJECTIVES / AGREED OUTCOMES

Summary of Key Achievements

| | Denny & Dunipace | | Falkirk | | Grangemouth & Bo'ness | |
|--|-----------------------------|---------------------|----------------|---------------------|----------------------------------|---------------------|
| <u>CLIENTS – April 13- Mar 14</u> | | | | | | |
| Contacts Core (Excl. CAD & Non-Core) | 3080 | | 5305 | | 4659 | |
| Contacts (CAD) | 848 | | N/A | | 995 | |
| Issues Core (Excl. CAD & Non-Core) | 13111 | | 17037 | | 12681 | |
| Issues (CAD) | 942 | | N/A | | 989 | |
| New/Unique Clients | 606 | | 2113 | | 1143 | |
| New Benefit Enquiries | 2097 | | 3599 | | 2468 | |
| <u>CLIENT GAINS– April 13- Mar 14</u> | | | | | | |
| Bureau – Benefit gains | £751,334.21 | | £925,408 | | £1,813,047 | |
| Bureau – other gains | £169,562.04 | | £163,715 | | £87,316 | |
| Bankruptcy/Trust Deeds | £298,357.26 | | £1,338,652 | | £292,374 | |
| Number of Bankruptcy/Trust Deed | 9 | | 57 | | 13 | |
| <u>WELFARE BENEFITS April 13- Mar 14</u> | | | | | | |
| Welfare Benefit Appointments | 136 | | 337 | | 212 | |
| Home Visits | 7 | | 35 | | 6 | |
| Benefit Checks | 244 | | 420 | | 557 | |
| Mandatory Reconsiderations | 0 | | 10 | | 26 | |
| Appeals Representation | 2 | | 12 | | 120 | |
| Won | 1 | | 7 | | 71 | |
| Lost | 1 | | 4 | | 49 | |
| Adjourned during tribunal | | | 1 | | | |
| <u>Number of Hours Outreach Sessions and New Contacts (Jan – March 14 only)</u> | | | | | | |
| | <u>Hours</u> | <u>New Contacts</u> | <u>Hours</u> | <u>New Contacts</u> | <u>Hours</u> | <u>New Contacts</u> |
| | 152 | 44 | 220 | 98 | 331 | 364 |
| <u>Referrals (Jan – March 14 only)</u> | | | | | | |
| To External Agencies | 3 | | 48 | | 103 | |
| Confirmed Take-ups | 3 | | 42 | | 48 | |
| To Food Bank | 30 | | 36 | | 56 | |
| Confirmed Take-ups | 30 | | 36 | | 56 | |

| <u>VOLUNTEERS– April 13- Mar 14</u> | | | |
|---------------------------------------|----|----|----|
| No. of New Volunteers | 8 | 2 | 13 |
| No. Active Volunteers | 27 | 24 | 15 |
| No. of Volunteers commencing training | 7 | 0 | 13 |
| No. of Volunteers completing training | 2 | 8 | 5 |
| No. of Volunteers leaving | 9 | 11 | 9 |

Summary of Key Issues/ Challenges Facing Organisation

Partly due to the extensive training provided, the CABx face an ongoing issue of high turnover of volunteers. Many volunteers make use of the opportunity of gaining the training and experience as a stepping stone into employment, which is a positive outcome for the volunteer, but a challenge for the CABx. The demand on volunteers has also increased due to the increasing complexity in cases.

How has Organisation Contributed to Council/ Service Priorities

The services provided by the CABx are directly in line with the Single Outcome Agreement and Towards a Fairer Falkirk. The CABx service is available to all citizens within the Falkirk Council area, however the bureaux target vulnerable groups via outreach services and working in partnership with other specialist service providers, for example Women's Aid, Signpost Forth Valley, Homestart Denny, Forth Valley acute hospital and Council services including CLD and Community Advice. Service is provided for those in crisis, however a considerable amount of work is now in place to support prevention and early intervention, for example provision of advice on financial capability and working with CLD regarding literacy and numeracy skills.

An additional aspect of working with other agencies includes supporting clients to CABx access the Falkirk Foodbank. Most of the referral made have resulted from a problem with benefits. It could be a delay in processing a new claim, a failure to make benefit payments on the due date or because a sanction has been applied. When clients present to the CABx they often have no food at all. Clients are given up to 3 day food parcel by Falkirk Foodbank. The CABx then deal with the benefit problem, which may be applying for a short term benefit advance if there is a delay in processing a new claim, or investigating why a payment has not been received on the due date, or applying for a hardship payment if a benefit has been sanctioned.

The CABx are currently participating a joint project with Falkirk Council's Advice Service to form Falkirk Area Welfare Benefits Advice Support Unit (FAWBASU) and also a project supporting people with mental health issues accessing Caledonia Clubhouse and Falkirk and District Association for Mental Health. Both of these project support vulnerable groups identified within the Towards a Fairer Falkirk strategy and add value to current provision within the area, mitigating the impacts of welfare reform.

List any Areas where there has been Shortfall in Performance

There have been no areas of shortfall in performance. It should however be noted that the bureaux ability to deal with the high demand on the service, coupled with the complex nature of cases is an ongoing challenge. Client contact numbers have slightly reduced as a result of the time taken to support individual cases.

How often are Review Meetings held with Lead Officer

The CABx provide quarterly monitoring returns. In addition the monitoring officer attend Board meetings, when possible and is a members of the Joint Action group which meets quarterly. There is also regular ah-hoc communication between the CABx and other Council Officers.

C FINANCIAL / RISK ASSESSMENT OVERVIEWTotal Support Provided (Financial & In- Kind Contributions)

In 2013/2014, financial support provided to the CABx from Falkirk Council was £457,396 and in-kind support was £11,000. This comprises:

| CAB | Denny & Dunipace | Falkirk | Grangemouth & Bo'ness |
|---------------------------------------|-----------------------------|----------------------|----------------------------------|
| Core | £62,097 | £105,213 | £68,246 |
| Income Maximisation | £9,624 | £9,624 | £9,624 |
| Fairer Falkirk Fund | £40,742 | £81,484 | £40,742 |
| ASAP – Falkirk | £20,000 | | |
| Maintenance – Building | £10,000 | | |
| Peppercorn rent | | | £11,000 |
| Total Council | £142,463 | £196,321 | £129,612 |
| Other sources of funding 13/14 | | | |
| CAS | £14,673 | £10,974 | £14,147 |
| Lottery | | £190,000 (area wide) | £25,185 |
| Charitable Trusts | £16,500 | | £4,848 |
| Patient Advice Support Service | £3,500 | £4,500 | £2,500 |
| Public Donations | | | £1,000 |
| Total other | £177,136 | £401,795 | £177,292 |

Proportion of Falkirk Council Funding against total income was 62%.

Last Period of Submitted Audited Accounts

Audited accounts for 2013/2014 have not yet been prepared. The most recent audited accounts submitted are 2012/2013.

Future Risks (Financial, Operational or Structural) Faced by OrganisationOperational risk/challenges

- Increased demand on the service especially in dealing with complex cases, in particular Welfare, debt, housing and employment issues and changes to Bankruptcy Legislation
- Ongoing training and support for staff and volunteers.
- Ensure effective referral systems are in place between local agencies.

- Falkirk CAB are working towards moving premises. This will be an expense to the bureau, which will require careful management. There may also be a challenge in service continuity during the transition period. Based on current plans, the new premises will be refurbished by December 2014. This is subject to securing additional funding and support to take the project forward.

Financial risk/challenges

- Secure external sources of funding to augment core provision. Applications are made jointly and by individual bureau. An issue regarding sustainability and continuity of service can arise, for example, Support and Connect funded project which funds additional resource to support people through the benefit appeal process is due to end on March 2015.
- Maintaining core service with standstill budget has resulted in bureaux having to make use of an element of reserves. There is an element of risk to this strategy as it is difficult to re-build reserves to an acceptable level.
- Grangemouth and Bo'ness Bureau received an additional on-off payment of £35,000 in 2012/2013 to support service delivery during 2013/2014. Payment was approved by Members and was allocated as to the bureau had maintained existing service level at the end of a short term period of funding by making use of reserves. The bureau has worked effectively to ensure that they will be able to deliver service at existing levels during 2014/2015.

Structural

- The CABx continue to operate as 3 independent organisations. The ongoing work of the Joint Action Group ensures that a consistent service is provided across the Falkirk Council area and efficiencies are achieved by joint initiatives regarding joint marketing and campaigning, recruitment and training of volunteers, sourcing external funds.

Overall Risk Rating (Low/Medium/High)

Medium

D CONCLUSIONS

Summary/ Opinion of Organisations Overall Progress During Year

Despite the challenges of increasing demand on service, the CABx have worked consistently well during 2013/2014. The CABx willingly participated in a Scrutiny Panel which reviewed ***'How well do Citizens Advice Bureaux work together in order to deliver consistent services across the Falkirk Council area?'***. The recommendations made as a result of the panel have been developed into actions which the bureaux are progressing. The CABx have developed strong partnership links with Council services and other local service providers, which has enhanced overall provision across the area.

| E COMPLETED BY | |
|-----------------------|--------------------------|
| <u>Name</u> | Lesley MacArthur |
| <u>Designation</u> | Corporate Policy Officer |
| <u>Date</u> | 09/04/14 |