



AGENDA ITEM

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**FOLLOWING THE PUBLIC
POUND (FPP): ADVICE
SERVICES**

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FALKIRK COUNCIL

Subject: FOLLOWING THE PUBLIC POUND (FPP): ADVICE SERVICES
Meeting: SCRUTINY COMMITTEE
Date: 12 MAY 2016
Author: DIRECTOR OF CORPORATE & HOUSING SERVICES

1. INTRODUCTION

- 1.1 The purpose of this report is to update Members on the work of the external organisations who receive funding, in whole or in part, who provide debt and money advice services, and who fall within the 'Following the Public Pound' (FPP) reporting and monitoring arrangements. The reporting period is April 2015 to March 2016.
- 1.2 External organisations are often voluntary or charitable organisations and generally, will be able to provide a better range or quality of service, or to provide services that would not otherwise be provided. The common purpose is usually to offer a wider range of services, often in conjunction with other public organisations and to provide joined-up services.

2. ADVICE SERVICES: FALKIRK'S STRATEGIC CONTEXT

- 2.1 Falkirk Council and Community Planning Partners have given a commitment to delivering services that support the most vulnerable individuals across the area. The Strategic Outcomes and Delivery Plan (SOLD) includes tackling the impact of poverty on children as one of its four key priorities and making our area a fairer and more equal place to live as one of six outcomes that the Community Planning Partnership is working to achieve.
- 2.2 A critical component in our ability to achieve our SOLD outcomes is that people have access to services and advice which will empower them to make informed decisions relating to the options available to them. The advice services that are currently in place within the Falkirk Council area contribute towards this.
- 2.3 The review of our poverty strategy, Towards a Fairer Falkirk, is on-going but it is anticipated that the key aims of existing strategy will remain unchanged though the focus may change. We are currently reviewing the impact of poverty and therefore the revised strategy will update who is particularly vulnerable regarding the effects of poverty and increasingly the impact of changes in benefits.
- 2.4 We have made some good progress on our poverty strategy aims and objectives around helping to mitigate the impact of poverty in our area.
- 2.5 Since approving the Poverty Strategy in 2011, the context within which the strategy is being delivered has changed with a number of Welfare Reform changes implemented or planned including the roll-out of Universal Credit which started in May 2015 for Falkirk

Council residents and the transfer of all remaining Disability Living Allowance to the Personal Independent Payment, expected to be completed by March 2018.

- 2.6 Although we have taken a number of actions aimed at mitigating the impact of welfare reform, our communities have yet to experience the full impact of reform given the delay in the introduction of universal credit, with its multiple impacts and the transfer from Disability Living Allowance to Personal Independence Payments. It is increasingly likely that the revised strategy will highlight the need to extend the focus of our action against poverty to people on low pay and in receipt of in-work benefits.
- 2.7 A further series of reforms to the welfare benefits system were announced by the Chancellor in July and November 2015. These include changes to Universal Credit tapers and thresholds, tax credits, mortgage interest support; a lowering of the benefits cap; reduction in Employment and Support allowance for new claimants; ending of automatic housing benefit entitlement for out of work 18-21 year olds; and a four year freeze in the value of most working-age benefits.
- 2.8 This second round of welfare reform changes announced in 2015 will result in a further £31m per annum reduction to the Falkirk Council area, bringing the total estimated annual impact of welfare reform to £63m per annum once fully rolled out.
- 2.9 This will have an on-going impact on our citizens and will require us to continue to provide advice and deliver services aimed at supporting the most vulnerable people living in our communities. Our Poverty Strategy and related strategies and plans will help us to do this. It is important that while we focus on those most vulnerable and disadvantaged including those impacted on by Welfare Reform, we need to continue to understand the impact of poverty on all of our communities including those in work, children, and people with a disability including mental health problems, etc.

3. OVERVIEW OF FUNDED ORGANISATIONS: ADVICE SERVICES

- 3.1 The table below shows the 5 external organisations that received Council support during 2015/2016, either via 'in kind' support or by direct financial support.

App.	Organisation	Funding Purpose	Total Support Received 15/16
1	Macmillan Money Advice	Forth Valley Money Advice Project	£40,000
2	Falkirk Credit Union	Project	£17,511
3	Falkirk Citizens Advice Bureau	Core	£186,986
3	Grangemouth & Bo'ness Citizens Advice Bureau	Core	£113,163
3	Denny & Dunipace Citizens Advice Bureau	Core	£107,321
4	Denny & Dunipace CAB on behalf of CABx	Falkirk Armed Services Advice Project	£18,000
	Total Funding		£482,981

4. ASSESSMENT OF INDIVIDUAL ORGANISATIONS PERFORMANCE

- 4.1 Individual reports are attached for all of the external organisations shown above at appendices one to four. Each report provides an overview of the service provided, the agreed objectives or outcomes, performance information during the reporting period and a financial overview. It should be noted that audited accounts for 2015/2016 have not yet been prepared for any of the organisations.
- 4.2 As part of the support allocation assessment process, external organisations are allocated a risk rating based on governance arrangements, financial management and past performance. The ratings are low, medium or high and provide Monitoring Officers with an indication of the minimum level of monitoring and support which should be established. External organisations deemed as low risk, are monitored at least annually, medium risk external organisations should be monitored at least quarterly and high risk, at least monthly. Monitoring is recommended to take the form of regular reports, which measure performance against outcomes and/or objectives and provide financial monitoring information. Monitoring Officers are also required to hold meetings with the external organisation throughout the year.

5. CONCLUSION

- 5.1 As set out within the report to this Committee on 13 June 2013, 'Following the Public Pound: Scrutiny Committee Role and Reporting Schedule', Members are invited to consider each organisation's report and select from the following options for each external organisation:
- A. Approve report and acknowledge progress by the external organisation in meeting Council priorities;
 - B. Request further information on specific aspects of the service provided; or
 - C. Request action with follow-up for subsequent Scrutiny Committee consideration.

6. RECOMMENDATIONS

Members are asked to:

- 6.1 **Consider individual reports for external organisations and select an option from those presented in 5.1.**

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DIRECTOR OF CORPORATE & HOUSING SERVICES

Date: 2 May 2016

Ref: ABC120516SB – FFP Advice Services

Contact Name: Sally Buchanan

LIST OF BACKGROUND PAPERS

1. Falkirk Council's Poverty Strategy.

Any person wishing to inspect the background papers listed above should telephone Falkirk 01324 506004 and ask for Fiona Campbell.

**FALKIRK COUNCIL CORPORATE & HOUSING SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING
STATEMENT 2015/16**

Organisation Name	Partnership between Stirling, Falkirk, Clackmannanshire Councils, NHS Forth Valley and Macmillan Cancer Support.
Project	Forth Valley Macmillan Money Matters Project
Agreement Dates	1 April 2015 to 31 March 2016
Name of Lead Officer	George Paul

A OVERALL ORGANISATION AIMS

Summary of Key Aims & Objectives

To offer easily accessible information and advice on money matters and financial wellbeing to cancer patients, their carers and families living in the Forth Valley area and to increase income available to these client groups.

List of Agreed Outcomes

Increase the income of cancer sufferers and their families living in the Forth Valley area by providing debt management and benefit advice. This enhances the lives of those affected by ensuring that their financial wellbeing is secured at a time of a diagnosis of cancer and that individuals remain financially included.

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

The project advisors understand the experiences and needs of cancer patients and their families and are trained to give expert advice to people experiencing these difficult circumstances and can ensure that the person has easy access to other Macmillan services. The project also has direct links with health professionals, which means they get referred at the point of diagnosis and are seen quickly. The project receives referrals for specialist advice to cancer sufferers and their families from Falkirk Council's Advice Service. Money Matters Advisers identify other important issues for patients, their carers and families and make referrals to a number of partner organisations including the Macmillan Helpline and Macmillan Financial Guidance Team; the Local Authority Money and Debt Advice Teams; the DWP Visiting Service; and local Carer Organisations to further support clients.

B ACTUAL PERFORMANCE vs. OBJECTIVES / AGREED OUTCOMES

Summary of Key Achievements

For the financial year 2015-2016, the project helped support 1079 clients living in the Forth Valley area. The project was successful in generating additional income of £2,937,597 for these clients.

In the Falkirk Council area, 558 clients were assisted and £1,514,151 of additional income secured.

Summary of Key Issues/ Challenges Facing Organisation

At times keeping up with the demand for services has presented real challenges to the workforce. The project comfortably exceeded its targets for 2015-16 (some 54% over target) and to ease the pressure of its workload, it intends to review incoming referrals with a view to capping these. 52% of referrals came from the Falkirk Council area so this will have a knock on effect on our citizens.

Additional challenges include the reduction in funding from Falkirk Council and the reduction in the working week from 37 to 35 hours for all Stirling Council employees.

How has Organisation Contributed to Council/ Service Priorities

The project has contributed to the following Council's Poverty Action Outcome of providing support to some of our most vulnerable citizens and improving their financial security by maximising the income of those households and improving benefit uptake and debt management. Clients also received assistance in a wide range of other, related, areas. Customer satisfaction results and user feedback is excellent.

This project enhances the lives of its service users by ensuring that their financial wellbeing is secured at a time of a diagnosis of cancer. By ensuring that individuals remain financially included, the project's intervention ensures that benefit income continues to be claimed from central government and utilised within local communities.

List any Areas where there has been Shortfall in Performance

None

How often are Review Meetings held with Lead Officer

Six monthly.

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

£40,000 from Falkirk Council

The project also received £32,000 from NHS Forth Valley and £100,000 from Stirling, which includes management support and funding in kind (office space, HR support, IT support, equipment, pool car vehicles). Clackmannanshire Council did not provide any funding for 2015-16, giving a total funding package amount of £172,000. The pattern of work activity for the year continued to represent an approximate 50/30/20% split across Falkirk, Stirling and Clackmannanshire respectively.

MacMillan provides financial support in kind in the form of advice and support to staff and clients, training and guidance for the team and access to the other Macmillan cancer support services.

As an organisation, Macmillan Cancer Support raised £215.2 million in 2014 (latest published figures). Most of this money came from legacies, direct marketing, fundraising events | and support from Macmillan's corporate partners. For the same year, after expenditure, Macmillan spent £151.7 million on services for people affected by cancer in the areas of: healthcare; financial, practical and emotional support; information and awareness raising; learning and development and inclusion.

Last Period of Submitted Audited Accounts

n/a – finances are managed by Stirling Council

Future Risks (Financial, Operational or Structural) Faced by Organisation

Funding from Falkirk, Stirling and NHS Forth Valley will be crucial to the delivery of the project. Funding has been agreed at the same rates for 2016-17 from NHS Forth Valley and Stirling Council. Other risks being faced by the organisation include the impact of the reduction in the working week from 37 to 35 hours for Stirling Council employees along with the possible capping of referrals being received.

Overall Risk Rating (Low/Medium/High)

Low/Medium

D CONCLUSIONS

Summary/ Opinion of Organisations Overall Progress During Year

The project has ensured that the needs of citizens are met and all targeted outcomes have been achieved.

E COMPLETED BY

<u>Name</u>	George Paul
<u>Designation</u>	Team Leader, Community Advice Services
<u>Date</u>	13 April 2016

**FALKIRK COUNCIL CORPORATE & HOUSING SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING
STATEMENT 2015/16**

Organisation Name	Falkirk and District Credit Union
Project	n/a
Agreement Dates	1 April 2015 to 31 March 2016
Name of Lead Officer	Jane Murie

A OVERALL ORGANISATION AIMS

Summary of Key Aims & Objectives

Falkirk and District Credit Union (FDCU) is the largest that we work with in the Falkirk Council area. Its main aims are to promote savings and offer reasonable credit to its members and to help members to manage their money.

List of Agreed Outcomes

Increase the number of new credit union members.
 Increase the amount of savings.
 Increase the number and value of member loans.
 Increase the number of collection points in the Falkirk Council area.
 Increase the number of volunteers and the amount of volunteer training.

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

It is not within the Council's statutory remit to provide the products and services offered by credit unions.

B ACTUAL PERFORMANCE vs. OBJECTIVES / AGREED OUTCOMES

Summary of Key Achievements

During the financial year 2015/16, membership numbers had increased by 339 adult members and 177 junior savers bringing total membership at the end of 2015/16 to 1820 adults and 637 juniors. During this year 667 inactive accounts were removed from credit union decreasing membership by 667. Savings had increased by 12.5% and loans by 12.8%. Four new collection points were opened. 26 new volunteers were recruited and a substantial amount of training was delivered for all volunteers. A significant number of promotional events and joint working initiatives have taken place over the last year to help secure these increases.

Summary of Key Issues/ Challenges Facing Organisation

FDCU is run largely by a board of voluntary members assisted by two part-time admin officers. Fairer Falkirk funding for the year provided an additional part-time admin officer along with a proportion of our Financial Inclusion Development Officer resource until 31st December 2015. The organisation is becoming more self sufficient and less reliant on funding from Falkirk Council and have agreed to take over the part-time administration officer from April 2017. FDCU have secured a Development worker for 10 hours a week for 12 weeks. FDCU, working with the Financial Inclusion Development Officer, have up dated their business plan and growth strategy.

How has Organisation Contributed to Council/ Service Priorities

FDCU contributes to the Council's poverty outcomes in the area of financial security by:

- Ensuring our citizens have increased choices when it comes to financial products and services;
- Increasing people's understanding of the consequences of the choices they make with regards to their finances;
- Maximising the income of households that rely on benefits; and
- Reducing levels of personal debt.

List any Areas where there has been Shortfall in Performance

We continue to work with FDCU to ensure a professional standard of governance is achieved. We are currently offering support to the credit union as and when required to assist them in achieving their targets.

How often are Review Meetings held with Lead Officer

Formal review meetings are normally held on a six monthly basis but this has been far more frequent during 2015-16, largely because of our additional investment of financial resources for the new online banking system and staffing resources in the form of the development officer and the need to seek assurance that these resources are being used to the best effect.

C FINANCIAL / RISK ASSESSMENT OVERVIEW

Total Support Provided (Financial & In- Kind Contributions)

£17,511 from Falkirk Council in the form of development officer and admin officer salaries and expenses.

The credit union also receives in-kind support of free lets in Council buildings for their collection points.

The credit union received income from loans to members, membership fees and donations but did not receive any other funding for 2015-16.

Last Period of Submitted Audited Accounts

Year ending 30 September 2015.

Future Risks (Financial, Operational or Structural) Faced by Organisation

The level of funding and support from Falkirk Council is gradually being reduced as the credit union grows and becomes more self sustaining. The credit union will need to continue to grow in order for this sustainability to be successful.

The organisation is largely dependent on involvement from its voluntary board members and other volunteers.

Overall Risk Rating (Low/Medium/High)

Medium. Quarterly monitoring arrangements are in place including information on performance outcomes and financial statements.

D CONCLUSIONS

Summary/ Opinion of Organisations Overall Progress During Year

The funding provided to FDCU has ensured that the needs of citizens are met and all targeted outcomes have been achieved.

E COMPLETED BY

Name

Jane Murie

Designation

Financial Inclusion Development Officer

Date

13 April 2016

**FALKIRK COUNCIL CORPORATE & HOUSING SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING
STATEMENT 2015/2016**

Organisation Name	Falkirk Grangemouth Denny and Dunipace Citizens Advice Bureaux
Project	Core Funding
Agreement Dates	1 April 2015 - 31 March 2016
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 welfare benefits and debt advice, a specialist service is also provided.

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, Citizen's Advice Scotland Advisor and Council Officer, as required. A Joint Strategic Plan 2014-2017 is in place and regularly reviewed and updated.

It should be noted that although the CABx receive funds from Corporate & Housing 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 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 from appropriately trained and qualified staff and volunteers.
- Outreach and community based services and activities are established and delivered in line with emerging need.
- Work collaboratively to ensure access to service across the area and to make best use of limited resource, including via external sources of funding.

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

The CABx provide a wide range of generalist and specialist services that adds considerable value to 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

<u>CLIENTS</u>	Denny & Dunipace		Falkirk		Grangemouth & Bo'ness	
	14/15	15/16	14/15	15/16	14/15	15/16
Contacts Core (Excl.CAD & Non- Core)	2674	2020	5691	5468	3638	3505
Contacts (CAD)	1239	1033	N/A	N/A	1320	832
Issues Core (Excl. CAD & Non-Core)	11,058	8936	17,508	18,185	11,821	11227
Issues (CAD)	1536	1250	N/A	N/A	1595	1121
New/Unique Clients	531	489	1886	1797	1185	2538
New Benefit Enquiries	1933	2006	2698	2820	2594	2660
<u>CLIENT GAINS</u>	14/15	15/16	14/15	15/16	14/15	15/16
Bureau – Benefit gains	603,955	764,974	1,253,215	1,143,094	1,500,689	1,254,366
Bureau – other gains	77,386	460,499	262,444	111,719	71,658	29,676
Bankruptcy/Trust Deeds	175,635	22,941	1,769,310	590,827	83,158	95,060
Number of Bankruptcy/Trust Deed	5	2	55	34	3	3
<u>WELFARE BENEFITS</u>	14/15	15/16	14/15	15/16	14/15	15/16
Welfare Benefit Appointments	104	78	408	423	193	294
Home Visits	7	10	36	37	10	12
Benefit Checks	293	221	326	200	613	643
Mandatory Reconsiderations	18	11	43	43	40	64
Appeals Representation	11	16	40	31	41	22
Won	3	9	21	22	19	14
Lost	5	5	13	14	16	5
Adjourned during tribunal	3	3	6	17	6	3
<u>Number of Hours Outreach Sessions and New Contacts</u>	<u>Hours</u> 356	<u>New Contacts</u> 50	<u>Hours</u> 805	<u>New Contacts</u> 466	<u>Hours</u> 726	<u>New Contacts</u> 766
<u>Referrals</u>	14/15	15/16	14/15	15/16	14/15	15/16
To External Agencies	11	13	124	88	48	53
Confirmed Take-ups	11	13	116	78	36	41
To Food Bank	62	54	68	76	104	138
Confirmed Take-ups	62	54	68	76	104	138

APPENDIX 3

<u>VOLUNTEERS</u>	14/15	15/16	14/15	15/16	14/15	15/16
No. of New Volunteers	7	7	6	11	15	11
No. Active Volunteers	24	21	20	24	11	13
No. of Volunteers commencing training	6	6	5	9	15	11
No. of Volunteers completing training	2	3	8	6	9	10
No. of Volunteers leaving	10	12	3	8	13	11
Training Provided	194	319	64	34	52	54

Summary of Key Issues/ Challenges Facing Organisation

To maintain, as a minimum, existing levels of service at a time of increasing demands and complexity of cases. This trend is certain to accelerate with the introduction of further austerity measures over the next two years.

How has Organisation Contributed to Council/ Service Priorities

Within the context of the Council Poverty Strategy, CABx enhanced the provision of advice relating to debt and income maximisation for areas and groups at risk of poverty in the Falkirk Council area. This contributes towards the goals of Falkirk Council's Corporate Plan by:

- Further developing a thriving, sustainable and vibrant economy;
- Continuing to improve the health, safety and well being of our citizens and communities; and
- Increasing our efforts to tackle disadvantage and discrimination.

CABx use the stability of core funding from Falkirk Council to seek additional grants for specific Projects, many of which are also focusing on Council Priorities. Examples in 2015/16 include services targeting: Fuel Poverty, individuals with mental health issues, council residents affected by Welfare Reform via FAWBASU. It should be noted that an additional £125k has recently been secured from the Scottish Government's People and Communities Fund, to continue FAWBASU for a further year until March 2017. Unfortunately, this funding does not cover the full cost of the project following the end of Lottery Funding, therefore the number of welfare benefits advisors will reduce from 4 to 2. Discussion is taking place with Falkirk Council Community Advice service to consider future partnership working to deliver the service.

CABx also bring in additional money to Falkirk Council residents. The client financial gains for 2015/16 were £3,764,328. This represents value for money in that for every £1 of core grant funding given to CABx, they generated £9.24.

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 attends 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 OVERVIEW

Total Support Provided (Financial & In- Kind Contributions)

In 2015/2016, financial support provided to the CABx from Falkirk Council was £407,470 and in-kind support was £11,000. This comprises:

CAB	Denny & Dunipace	Falkirk	Grangemouth & Bo'ness
Core	£56,955	£95,878	£62,797
Income Maximisation	£9,624	£9,624	£9,624
Fairer Falkirk Fund	£40,742	£81,484	£40,742
ASAP – Falkirk	£18,000		
Total Council	£107,321	£186,986*	£113,163
Other sources of funding 15/16			
CAS	£44,844	£13,427	£68,203
Lottery		£20,000	£8,239
Scottish Government		£113,185	£38,044
Charitable Trusts	£1,200		£2,000
Patient Advice Support Service	£3,570	£4,500	£2,500
SCVO		£5,931	
Other		£49,425 (CAS – restricted for refurbishment of premises)	£7,058
Total other	£49,614	£206,468	£126,044

*NB: £30,000 Core funding was retained during 2015/2016 as a contribution towards the refurbishment new premises. Therefore the actual payment to Falkirk CAB was £156,986.

Proportion of Falkirk Council Funding against total income was approximately 45%.

Last Period of Submitted Audited Accounts

Audited accounts for 2015/2016 have not yet been prepared. The most recent audited accounts submitted are 2014/2015. No issues were identified. Information relating to income and expenditure is provided quarterly. No issues have been identified during 2015/2016, over and above stability and sustainability of external funding sources.

Future Risks (Financial, Operational or Structural) Faced by Organisation

Operational risk/challenges

- Emerging impact of Welfare Reform on vulnerable clients.
- Ongoing training and support for staff and volunteers.
- Ability to work with effectively with partners, due to the global reduction in capacity due to budgetary constraint.
- Falkirk CAB identified new premises in Meeks Road, Falkirk, however an issue with rot has been identified. This has resulted in a considerable delay in the refurbishment of the premises, which had an initial completion date of February 2016. Development Services are currently progressing the issue, however it is unlikely that the refit will take place until early 2017.

Financial risk/challenges

- Secure external sources of funding to augment core provision.
- Maintaining core service with during 2015/2016, following a 5% funding reduction has been a significant challenge, which has resulted in in bureaux having to make use of an element of reserves. CABx are currently assessing the impact of further budget reductions for 2016/2017.

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 2015/2016.

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>	14 April 2016

**-FALKIRK COUNCIL CORPORATE AND HOUSING SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING
STATEMENT 2015/16**

Organisation Name	Falkirk Armed Services Advice Project – Falkirk CABx
Project	Falkirk Armed Services Advice Project
Agreement Dates	1 st April 2015 – 31 st March 2016
Name of Lead Officer	Caird Forsyth

A OVERALL ORGANISATION AIMS

Summary of Key Aims & Objectives

- Appoint Armed Services Advice Project, Project Officer
- Market availability of the service to services/organisations and community
- Raise awareness amongst generic CAB advisers about particular needs of armed services/veterans community
- Build relationship with local veteran support services

List of Agreed Outcomes

- Appointment of Armed Services Advice Project, Project Officer
- Preparation of marketing material
- Contact services in Falkirk Council area and advise of project and confirm referral process
- Promotion of project – giving presentations / providing information stands as required in the Falkirk Council area
- Meet with clients referred / self referred providing advice / assistance as required

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

Provides bespoke advice service for veterans resident in the Falkirk Council area assisting them to access services provided by the council or charitable services provided by veterans charities who operate throughout Scotland. The project is staffed by ex forces personnel and is part of a network that operates throughout Scotland. Those presenting to the service often have complex needs relating to their service within the forces which the adviser can relate to. The service is viewed by clients as understanding their particular needs.

B ACTUAL PERFORMANCE vs. OBJECTIVES / AGREED OUTCOMES

Summary of Key Achievements

- Ongoing marketing activities of the service across the Falkirk Council area
- Accepting referral and self referral of / from veterans seeking help who are resident in the Falkirk Council area.

- Providing a range of advice to 228 veterans between 01/04/2015 and 31/03/2016 (180 between 01/04/2014 and 31/03/2015) representing a 27% increase on the previous year. The top issues cited are benefits, debt and employment however clients also present with a wider range of issues, including, housing, legal, education, and relationships problems.

During the period of review increase in enquiries for application to Service Charities for assistance as well as an increase in PIP enquiries has been noted.

Clients from the age range 45 – 59 age group are the largest client group presenting for advice and assistance. These clients tend to be male, single and from an Army background.

An example of the type of support provided is outlined below:

Case Outline

Client is a former infantry soldier who had left the Army over seven years ago. Client has alcohol and drug addiction issues and had a history of violence, self-harm and had attempted suicide in the past. Client is in poor mental and physical health. After a period of homelessness the client now lives alone in a Council Flat and is in receipt of Housing Benefit, Council Tax Reduction and Employment Support Allowance. The Client had recently been in receipt of Disability Living Allowance however had been transferred to Personal Independence Payment (PIP). As a result of the transfer the client had not been awarded anything for the Daily Living Component of PIP. The client was now financially worse off by at least £55 per week. The client had challenged this decision with the DWP but was unsuccessful and now wanted assistance to appeal the decision which he felt was wrong. The client was in an agitated and disturbed condition and in his words was “stressed to the hilt” with the situation. Client felt that he was butting his head against a brick wall and no one was listening to him. The client had poor mental health and this situation was only making things worse.

Assistance Given

The ASAP Support Officer carried out a benefits check and determined that the Client was in receipt of the benefits that he was entitled to. The Support Officer also identified that there was a possible entitlement to the Daily Living Component of PIP. Over a number of appointments the ASAP Support Officer, working closely with the client, gathered sufficient evidence to find the grounds to submit an appeal against the DWP decision not to award the client any form of award for Personal Independent Payment Daily Living Component. Throughout the process the Support Officer liaised with the clients other Support Workers to ensure that the client was properly supported through what was going to be a very stressful period.

Positive outcomes

The Support Officer submitted the appeal to HM Courts and Tribunal Service however before the date for the Tribunal was set, the DWP contacted the ASAP Support Officer to say that they had looked at the Appeal submission and as a result had revised their decision regarding clients PIP claim and as a result had changed the original decision and had awarded the client the Daily Living Component at the Enhanced Rate. This meant that the client did not have to appear at a Tribunal hearing and he received a backdated lump sum of over £2000.00. Going forward the client's weekly income will be increased by @£82.30.

The client was very grateful for the support provided by ASAP and felt relieved that he would not have to appear at a tribunal.

The client continues to receive support from ASAP who will continue, where required to work with the other organisations involved with the client to ensure the best outcome for the client.

Summary of Key Issues/ Challenges Facing Organisation

Service continues to provide a sought after service to people with veteran status and their dependants who reside within the Falkirk Council area and reaches a client group who may previously have travelled for advice or attempted to deal with problems on their own and possibly not reaching a satisfactory conclusion.

Service needs to continually market availability and extend availability of the service by raising awareness of issues for veterans with generic CAB workers and other agencies including local authority.

How has Organisation Contributed to Council/ Service Priorities

SOA – Health Inequalities and Physical Activity – Reduced health inequalities and equitable access to health care and support

Falkirk Councils commitment to Armed Services Community Covenant – provision of help for veterans within our community experiencing difficulty with a range of issues including Health, Debt and Housing.

List any Areas where there has been Shortfall in Performance

None found / recorded

How often are Review Meetings held with Lead Officer

ASAP Project Officer and Manager of Denny CAB attend quarterly meetings of Falkirk Armed Services Community Covenant Group and with the Lead Officer and Falkirk Council Veterans Champion (Depute Provost Cllr John Patrick) on a quarterly basis.

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

£18,000 from Falkirk Council

£10,000 from Poppy Scotland during the period alleviating financial support previously provided by CABx.

Project continues to access national support (Training, Conferences/Seminars and Peer Group Meetings) that is provided for ASAP by Poppy Scotland.

Last Period of Submitted Audited Accounts

The audited accounts for the period 2015/2016 have not been developed.

CAB provide quarterly income and expenditure reports and report no current issues.

Future Risks (Financial, Operational or Structural) Faced by Organisation

Continuation of the service dependant on funding with the challenge of ensuring that generic advisers are trained/briefed. Funding for period 2015/2016 was reduced to £18,000 from £20,000 with no detriment to service provided.

Overall Risk Rating (Low/Medium/High)

Medium

D CONCLUSIONSSummary/ Opinion of Organisations Overall Progress During Year

The service continues to provide support to veterans in the area either as a direct result of contact (self referral) with CABx or through contact with local authority and other services seeking help with life circumstances.

E COMPLETED BY

Name

Caird Forsyth

Designation

Policy Officer Substance Misuse

Date

18th April 2015