

The background of the slide features a large, light blue coat of arms of the City of Edinburgh. The coat of arms consists of a shield divided into four quarters. The top-left quarter shows a castle tower, the top-right shows a stag's head with antlers, the bottom-left shows a sailing ship on waves, and the bottom-right shows a crowned eagle with spread wings. Above the shield is a crown with four fleurs-de-lis. A ribbon at the bottom contains the motto 'ANE FOR A'.

Agenda Item 4

Following the Public Pound – Poverty and Equalities

Falkirk Council

Title: Following the Public Pound – Poverty and Equalities

Meeting: Scrutiny Committee (External)

Date: 26 November 2020

Submitted By: Director of Corporate and Housing Services

1. Purpose of Report

- 1.1 This report provides information under the Following the Public Pound arrangements for the period 1 April 2019 to 31 March 2020 for the Council's outcome to make our area a fairer and more equal place to live.

2. Recommendation(s)

- 2.1 The Committee is invited to consider each organisation's report and select from the following options for each external organisation:
- 1) Approve the report and acknowledge progress by the external organisation in meeting Council priorities;
 - 2) Request further information be provided to them on specific aspects of the service provided; or
 - 3) Request a follow-up report for a subsequent Scrutiny External Committees consideration on specific aspects of the organisations performance or on the organisation as a whole.

3. Background

- 3.1 External organisations which receive funding from Falkirk Council are subject to formal monitoring, scrutiny and reporting. The organisations that receive funding to support our poverty and inequality outcome are from the third sector i.e. voluntary or charitable organisations.
- 3.2 These organisations are funded on the basis that they are able to provide services which could not readily be provided by the Council or have not been provided by the Council in the past.
- 3.3 As with other organisations, some were subject to a reduction in funding in recent years, though not all. Whilst the long term value of the services provided by these organisations is acknowledged, reducing budgets for the Council have required a critical examination of how much support the Council can afford now and in future years.

- 3.4 The Committee has sought to understand the contribution that various organisations make to achieving the priorities and outcomes that are of importance to the Council. This latter role is increasingly a focus for services given the need to reduce duplication, be consistent in service delivery across the Council area and to achieve a joined approach to service delivery.
- 3.5 Monitoring by officers takes the form of regular reports and meetings. Each monitoring statement, attached as appendices, provides an overview of the service funded by the Council, the agreed objectives or outcomes, performance information during the period and also a financial overview.
- 3.6 The Council leads the Community Planning Partnership's delivery groups for poverty and inequalities. The focus of these groups are to oversee the delivery of the following outcome:

Our Area Will Be A Fairer And More Equal Place To Live. To achieve this outcome we will:

- Improve our focus on equalities issues and human rights
- Work with all communities to build more cohesive communities that recognise and celebrate diversity
- Seek to increase household income
- Address the impact of poverty on children
- Prioritise disadvantaged communities when designing and delivering services
- Improve access to services for our most vulnerable individuals and families
- Define a basic standard of living we would expect everyone in Falkirk to enjoy
- Reduce the stigma of poverty on people, families and communities

- 3.7 The organisations funded or monitored by the Council that support this outcome include:

Organisation	Monitoring Service	2019/2020 Funding
LGBT Youth Scotland	Children's Services	£29,750
Falkirk CAB	Corporate and Housing Services	£168,490
Grangemouth & Bo'ness CAB	Corporate and Housing Services	£98,360
Denny & Dunipace CAB	Corporate and Housing Services	£92,810
MacMillan Money Matters	Corporate and Housing Services	£38,000
Armed Forces Project - Denny CAB	Corporate and Housing Services	£18,000

Equalities

3.8 The Council has legal obligations with regards to equalities. The Equality Act 2010 sets out a general equality duty which requires the Council to demonstrate 'due regard' in the way it conducts business; delivers services and makes decisions. The elements of the general duty are to:

- Eliminate unlawful discrimination, harassment and victimisation and other prohibited conduct
- Advance equality of opportunity between people who share a relevant protected characteristic and those who do not
- Foster good relations between people who share a protected characteristic and those who do not.

3.9 This means that, in addition to ensuring we are not discriminating against protected characteristic groups on our decision making and service delivery, we must actively seek to promote equalities.

3.10 The Council also has clear outcomes for delivering on equalities and these are set out in our equalities outcomes statement published every two years. The current outcomes include:

Council or community outcomes

- Access to our services will be improved by understanding and reducing barriers
- Our communities are supported to understand and celebrate the diversity of those who live work and visit the area
- Our approach to engagement and participation will give a voice to our diverse communities
- Our communities will report harassment, hate crime and gender based violence
- People within the relevant protected characteristic groups or who experience other forms of discrimination or disadvantage are able to be themselves and can achieve their full potential

Education Outcomes

- Children and young people within the relevant protected characteristic groups or who experience other forms of discrimination and disadvantage are able to achieve their full potential
- Children and young people within the relevant protected characteristic groups in Falkirk Schools feel safe, supported and able to be themselves

Employment Outcomes

- Improved quality employee data across all equality protected characteristics

- Increased representation of minority ethnic groups, disabled people, young people aged 16 – 24 and LGBT people across Falkirk Council workforce
- Reduced job segregation and pay gaps

3.11 The Group the Council funds to support this outcome is LGBT Youth Scotland.

Poverty

3.12 The Council undertakes a significant amount of work to support people in poverty. This includes providing direct support from a number of services, redesigning services to provide a joined up service to those who need advice and support and supporting a range of providers to make sure that people have access to advice and support that can help them maximise their income.

3.13 Our refreshed poverty strategy 'Towards a Fairer Falkirk 2019-2024' was approved by Council Executive in February 2019 and Falkirk Community Planning Partnership Strategic Board in March 2019. The refreshed strategy and action plan are based on four themes:

- Fairer Access
- Fairer Money
- Fairer Childhood
- Fairer Culture

3.14 The organisations we fund support us to achieve the outcomes of our poverty strategy, particularly around access to services, income maximisation and access to appropriate financial products and advice, as part of the Fairer Money theme.

3.15 The groups the Council funds to support this outcome is LGBT Youth Scotland are the three Citizen's Advice Bureaux, MacMillan Money Matters and the Armed Services Advice Project.

4. Impact of Covid 19 Pandemic

4.1 The Covid pandemic has impacted significantly on people living on a low income, many of whom work in the sectors most impacted by current restrictions. We are already seeing significant increases in the number of people claiming benefits in the Falkirk area and expect this to increase further as furlough comes to an end. We expect the number of people in poverty will increase due to the impact on the economy, whilst those already in poverty are likely to be affected to a greater extent, for example through digital exclusion.

4.2 This report covers the reporting period April 2019 to March 2020 and therefore does not provide information on the organisations performance during the Covid pandemic. However we are aware that the organisations included in

this report have worked extremely hard to make sure their services are still available to people through the pandemic.

- 4.3 Information on the impact of the pandemic on each organisation and how they have supported people is included in each individual report in the Appendices. It is however clear that organisations have done everything they possibly can to provide services throughout the pandemic and in very difficult circumstances with staff and volunteers working remotely.

5. Implications

Financial

- 5.1 The funding allocated to each group is agreed by Council at its budget meeting in February each year. The information set out in this report should inform those decisions.

Resources

- 5.2 Nil.

Legal

- 5.3 Nil.

Risk

- 5.4 Following the Public Pound processes are designed to assess and mitigate risks to the Council of funding external organisations.

Equalities

- 5.5 Any changes in funding to this organisation will be subject to an Equalities and Poverty Impact Assessment prior to the funding allocation as part of budget setting.

Sustainability/Environmental Impact

- 5.6 Nil.

6. Conclusions

- 6.1 The Committee is asked to consider the projects reported and to determine any future reports or information it may want from Officers.

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Date – 02 November 2020

Appendices

- Appendix One – LGBT Youth
- Appendix Two – Citizen's Advice Bureaux
- Appendix Three – Armed Services Advice Project
- Appendix Four – MacMillan Money Matters

List of Background Papers:

The following papers were relied on in the preparation of this report in terms of the Local Government (Scotland) Act 1973:

None

**FALKIRK COUNCIL CHILDREN'S SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING STATEMENT 2019/20**

Organisation Name	LGBT Youth Scotland
Project	Community Development Project
Agreement Dates	1 April 2019-31 March 2020
Name of Lead Officer	Mark Meechan

A OVERALL ORGANISATION AIMS

Summary of Key Aims & Objectives of Organisation

i. Summary of Key Aims & Objectives:

To improve the quality of life, health and wellbeing and opportunities available to LGBT young people with the area, in particular those LGBT young people at risk of disadvantage or exclusion.

ii. List of Agreed Outcomes:

- To provide a range of community learning and development activities to LGBT young people living within the Falkirk Council area.:
- To provide a range of positive opportunities for LGBT young people by providing youth groups and opportunities to gain accreditation.
- To promote and support volunteering locally.
- To provide community meeting space and local information point, including internet access.
- To raise awareness of the service with the local community.

What is the purpose of the funding provided by the Council?

LGBT Youth Scotland provides Community Development Services to LGBT young people and their families across the Falkirk Council area.

The work undertaken by the LGBT Youth Scotland contributes to Falkirk's Strategic Outcomes and Local Delivery (SOLD) Plan. The LGBT Youth Scotland contributes to the following 4 priorities:

- Improving mental health and wellbeing
- Maximising job creation and employability
- Minimising the impact of substance misuse
- Addressing the impact of poverty on children

And the following 5 outcomes:

- Our area will be a fairer and more equal place to live
- Our children will develop into resilient, confident and successful adults
- Our population will be healthier
- People live full, independent and positive lives within supportive communities
- Our area will be a safer place to live

Why Does the Council fund this?

The Council is committed to reducing inequality and developing early intervention with vulnerable children, young people, families and communities.

The work makes a significant contribution reducing the impact of inequality experienced by LGBT young people.

The work undertaken is outcome focused and contributes to individuals having the best start in life and improving community wellbeing.

How long has the Council Funded this Organisation to Deliver this Service? When did the Council agree to fund this?

LGBT Youth Scotland has been part funded by Falkirk Council for 1 year.

The Council agreed to a continuation of funding for 2017/18, 2018/19, 2019/20 and 2020/21.

Set out the funding provided by the Council for the last five years

<u>Year</u>	<u>Annual Funding</u>	<u>Support in Kind</u>	<u>One Off Support</u>
2019/2020	£29,705	£1,500	
2018/2019	£29,705	£1,500	
2017/2018	£29,708	£1,500	
2016/2017	£30,000	£1,000	

B SERVICE DELIVERY

What does the organisation deliver and to whom?

LGBT Youth Scotland deliver youth groups that are youth led where young people are involved on the planning of their weekly group.

LGBT Youth Scotland offers support to LGBT young people and their families on a 1-2-1 and/or group work basis.

LGBT Youth Scotland also delivers work in Falkirk's secondary schools.

Who and how many people directly benefit from the organisation?

From 1 April 2019 to 31 March 2020

- Total number of Young People in youth group: 30
- Number of Group work session: 47
- Number of contacts with young people within youth group: 431
- Total number of 1.1 coaching sessions: 63

Prior to the pandemic LGBT Youth Scotland's youth group FK1include, based in Falkirk, met on a weekly basis at the venue in Park Street. Between April 2019 and March 2020, the young people participated in a range of different activities. Staff, volunteers and young people led a number of various sessions including cooking skills, mental health and wellbeing, social media, baking, clothes upcycling, exam results support, jewellery making, aromatherapy and LGBT people in the media.

Young people worked on enhancing previous work done with NHS Forth Valley by beginning to design posters for local hospitals to signify that they are LGBTI inclusive spaces. The group also co-hosted a Purple Friday event with Falkirk Council where the group designed and facilitated a Human Library. This gave the young people the opportunity to tell their stories about identifying as LGBT and living in the Forth Valley areas with elected members.

LGBT Youth Scotland led sessions on various events within the cultural calendar such as Coming Out Day, World AIDS day, Trans Day of Remembrance, and Halloween.

External partners have delivered a workshop on the experiences of trans people in Scotland, with a chance for young people to ask questions relevant to current trans issues and rights, a photography skills (Stills Academy Edinburgh – delivered by a Falkirk young person), group cycle to the Kelpies/Helix Park (CSREC) and mindfulness (individual practitioner), and LUSH bath bomb making.

Youth Scotland delivered their iLead Engage programme over two group sessions allowing 4 young people to achieve Hi5 awards, whilst developing their communication and team-work skills and knowledge.

The young people had opportunities to attend additional activities with other LGBT Youth Scotland youth groups such as Leap Sports LGBT History Month Bowling Tournament, a trip to the Edinburgh playhouse to see the Lion King, and a trip to a local cinema to view a live screening of "Everybody's Talking About Jamie" and a pool party at the Mariner Centre funded as part of LEAP Sports Festival Fortnight.

LGBT Youth Scotland also facilitated trips to various Pride events including Edinburgh Pride, Dundee Pride and Forth Valley Pride. These activities gave young people the chance to meet with young people from other LGBTYS groups. Young people from FK1include also had the opportunity to attend Pride Youth Games with LGBT Youth Scotland and LEAP Sports, an opportunity which a number of young people took up. They travelled to Manchester for a

weekend residential and took part in sporting activities including rock climbing and archery. They also attended a 4 day residential at Auchengillan Outdoor Centre with Scouts Scotland in which young people took part in a number of outdoor activities. During this the young people were able to push their comfort levels and increase their teamwork skills while participating in new activities.

School Engagement and LGBT Charter

- Denny High School are working towards the gold charter and received relevant training
- Homophobia, Biphobia, Transphobia Bullying session delivered at Denny High School to teaching staff from Falkirk.
- Delivered sexual health workshop with Braes High School Equalities group following young people requesting input.
- Braes High School awarded the Bronze LGBT Charter
- Delivered sessions to 1st, 2nd and 3rd year pupils at Grangemouth High School as part of Health and Wellbeing week, focusing on LGBT definitions, gender stereotypes and bullying.
- Victoria Primary School staff receiving LGBT awareness training at two twilight training sessions
- Denny High School LGBT group presented a cheque to LGBT Youth Scotland from their Purple Friday fundraising
- Ongoing work with Braes High School Equalities group
- Met with Falkirk High School LGBT group to introduce LGBT Youth Scotland services, and supported their session on setting group guidelines.
- Q&A chat with Falkirk School Nurse team to answer questions they had in relation to supporting LGBT young people. They were also directed to a range of resources and informed of the provision offered by LGBTYS in Falkirk.

Additional Support

- Presentations delivered to Falkirk Community Trust and Falkirk CLD team about the LGBT Charter
- Two graduates from Falkirk Council supported to meet with LGBTYS Senior Policy & Research Officer and also Youth & Community Development Officer (Forth Valley) to improve their awareness of the work of LGBTYS.
- Attendance at relevant Falkirk CVS forums
- Attendance at CC Children's Rights and Equalities group
- Attended Forth Valley College Volunteer Fayre to engage with students on possible volunteer opportunities with LGBT YS

Work Undertaken During the Covid-19 Pandemic

- Total number of young people in youth group: 10
- Number of Group work session: 31
- Number of contacts with young people within youth group: 123
- Total number of 1:1 coaching sessions: 27

Due to Covid-19 and the restrictions put in place LGBT y unable to deliver face to face youth groups or 1:1 support for young people.

LGBT Youth Scotland were successful in transitioning quickly and smoothly to digital youth work responding to the needs of young people through our new digital platform Pride and Pixels on Discord. This platform began development in 2019 as a tool to ensure that we could integrate more young people into youth groups, removing barriers presented by location, lack of confidence or support at home, challenges with transport and access.

During the Covid-19 pandemic, Falkirk's LGBT Youth Scotland group has seen a dip in the numbers of young people attending groups since moving to online delivery and this has been consistent across the youth work sector.

LGBT Youth Scotland have supported young people in consultation and completed some research with young people around this and are in the process of analysing this information. LGBT Youth Scotland know, anecdotally, some young people are experiencing digital poverty, some young people are experiencing digital fatigue, some young people are not out at home and therefore it isn't safe for them to engage fully, and some young people are struggling with their mental health as a result of Covid-19. We've focused our support on the key areas that we knew LGBT young people were struggling with during lockdown:

- Reducing isolation
- Improving wellbeing and mental health
- Building resilience to deal with difficult home situations

LGBT Youth Scotland have provided increased one to one support for LGBT young people via phone, voice chat and video calls. LGBT Youth Scotland worked with young people to deliver a safe community space for them to meet, make friends and gain the peer support normally provided through face to face groups and national events.

Between April 2019 and March 2020, the young people participated in a range of different activities led by both staff and young people including sign language, online games, a Drag workshop, mindfulness, and an online escape room.

The group was able to review our LGBT Education Awareness training and feedback to our Education Officer about any changes or comments they would like to see regarding this training. The group took part in our International Day Against Homophobia online world tour workshop in which they explored various LGBT historic sites and monuments from across the world and fed back that they really enjoyed this activity. The group has also participated in debate nights looking at LGBT Culture.

LGBT Youth Scotland have been supporting young people with complex situations that may be heightened due to the pandemic. LGBT Youth Scotland have had challenges in referring young people for support around their mental health or who are currently in crisis and are providing intense support around issues such as isolation, anxiety, depression, self-harm and suicidal thoughts etc.

Detailed below are impact statements from young people on the work of Falkirk's LGBT Youth Scotland provision:

"Although I've only been able to access group since we've moved to online calls I've had a really good time and as someone who gets energy from talking to people it's been super helpful to still speak to people on a scheduled basis. It's been absolutely brill and I really appreciate the youth workers trying to implement fun games like treasure hunts and bingo because it gives us something a bit different to do at home!"

"Since joining LGBT Youth Scotland around a year ago, I've left school and started a college course that in 3 years time will leave me with a degree. I don't think this is a step I would ever have taken without the support of my friends and youth worker from my youth group."

"I've lost a lot of people I was friendly with from school because I realized I wasn't being treated with the same level of respect as they were treating everyone else. I've now got one of the best friend circles I could possibly have asked for thanks to my youth group. I wouldn't give up the friends I've made for anything."

"I have made new friends despite not having any previously, feel confident when it comes to making friends in the future in a new environment."

"LGBT youth has literally changed my life over the last year. I reached out at a time when I was feeling really alone and depressed and whilst I still struggle, I know there are people there who I can talk to now." [LGBTYS] Greatly improved my life, I have friends now that I didn't have before and a more positive outlook on life and the future."

"The group has helped me know who I really am"

LGBT Youth Scotland will continue to deliver a truly innovative blend of face to face support, online community building and fun and informative learning across all of our services, having a positive impact for LGBT young people in a period where research is telling us that they are likely to struggle to achieve as much as they would have pre-Covid-19.

Set out what other similar and or complementary services are provided which are similar in function or support the same client / communities.

Within the Falkirk Council area, there are no other organisations that specifically provide similar services to LGBT Youth Scotland.

The Council does fund other community development projects/services within the Falkirk Council area.

However, these projects do not provide specific services to LGBT young people across the Falkirk Council area.

How does this organisation support the Council achieve its priorities?

LGBT Youth Scotland contributes to the Strategic Outcomes and Local Delivery Plan - Falkirk Community Planning Partnership 2016-2020 through the delivery of community development interventions to children, young people, families and community groups within the Falkirk Council area.

The work undertaken by the LGBT Youth Scotland contributes to Falkirk's Strategic Outcomes and Local Delivery (SOLD) Plan. The LGBT Youth Scotland contributes to the following 4 priorities:

- Improving mental health and wellbeing
- Maximising job creation and employability
- Minimising the impact of substance misuse
- Addressing the impact of poverty on children

And the following 5 outcomes:

- Our area will be a fairer and more equal place to live
- Our children will develop into resilient, confident and successful adults
- Our population will be healthier
- People live full, independent and positive lives within supportive communities
- Our area will be a safer place to live

Are there any areas of improvement and efficiency that could be achieved?

LGBT Youth Scotland have identified the following improvement actions for 2019/20:

1. Support more schools and organisations to achieve the LGBT Charter of Rights Award.
2. Build on positive work with partner organisations to offer new and challenging opportunities for LGBT young people that contribute to their learning and development in Falkirk.
3. Work proactively to increase group numbers by sharing information about the groups and resources to partners and actively promoting to young people

Which areas does this service / organisation cover within the Council area? – Be Specific.

LGBT Youth Scotland provides services to LGBT young people from across the Falkirk Council area.

C ASSESMENT OF PERFORMANCE

Set out current agreed performance information alongside previous years and future years. If there is any benchmarking information provide that.

LGBT Youth Scotland is subject to inspection by HMIE.

In addition to this, LGBT Youth Scotland is regularly visited by Community Learning and Development Service staff and Development Services staff

LGBT Youth Scotland undertakes internal reviews of its service delivery and working practices to ensure efficient and effective outcome focused delivery.

Are there any aspects of performance that are causing concern or need to be improved. If so what are they and what are the plans for improvement?

LGBT Youth Scotland have complied with Falkirk Council's Joint Working Agreement.

When was the last time the service was reviewed and what plans are there to review this?

Monitoring and review meetings are held between the Project Manager and the Monitoring Officer every 8/10 weeks.

Date of the most recent Monitoring/Review Meeting was on 21 October 2020.

Next scheduled Monitoring/Review Meeting is 14 December 2020.

D FINANCIAL / RISK ASSESSMENT OVERVIEW

Set out Falkirk Council funding as a % of the organisations budget. Including financial and in kind contributions.

The funding granted by Falkirk Council to the LGBT Youth Scotland is 100% of the overall running costs associated with the project.

List other sources of funding the organisation has and how much is provided by source.

N/A

What is the amount of uncommitted reserves held by the organisation?

LGBT Youth Scotland have £246,042 uncommitted reserves.

What proportion of operation cost do reserves represent?

20%.

<u>Last Period of Submitted Audited Accounts</u>
2019/20
What other services does the Council fund that are similar to this organisation including Council provision and to what level are those activities funded? The Council does not fund other organisations that directly deliver community development services to LGBT young people.
Future sustainability- Are there ways in which the organisation can improve resilience and decrease the money required from the Council? LGBT Youth Scotland are exploring opportunities to secure external funding. However, there are limited opportunities to secure external funding that would cover core costs.
How can reductions in funding be achieved? Decreasing the present level of funding would directly affect the services that LGBT Youth Scotland could provide.
What is the risk to the Council if these services are not funded? The Council would not be able to provide the Services that LGBT Youth Scotland provides.
Overall Risk Rating (Low/Medium/High) If grant funding at present level is maintained there would be a low/medium risk to the Project.
E CONCLUSIONS
Summary of the future activities of the organisation that will allow services to continue to be delivered. LGBT Youth Scotland plan to continue to deliver community development interventions with LGBT young people and their families. There is evidence that the Project is improving outcomes for most of the LGBT young people organisations they are work with. There is clear evidence that the Project has managed the transition in service delivery arrangement effectively during Covid-19. The Project continue to demonstrated value for the funding provided by the Council in 2019/20.

F COMPLETED BY	
<u>Name</u>	Mark Meechan
<u>Designation</u>	Community Learning and Development Manager
<u>Date</u>	06/11/2020

FALKIRK COUNCIL
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING STATEMENT 2019/20

Organisation Name	Denny & Dunipace, Falkirk, and Grangemouth & Bo'ness Citizens Advice Bureau
Project	Income Maximisation Funding
Agreement Dates	1 April 2019 - 31 March 2020
Name of Monitoring Officer	Sally Buchanan

A OVERALL ORGANISATION AIMS

1. Summary of key aims & objectives of organisation

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 to recruit, train and support volunteers. The CABx work with approximately 60 volunteers at any given time.

Although there are 3 independent bureaux 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 a Council Officer, as required. A Joint Strategic Plan is in place and regularly reviewed.

2. What is the purpose of the funding provided by the Council?

The purpose of this funding is to ensure every Citizen in the Falkirk area has access to advice services which are adaptable to suit national reform and local interpretation, and to ensure that no individual 'falls through the gaps'.

The CABx provide:

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

The CABx work collaboratively to ensure services are available across the area and to make best use of limited resource, including via external sources of funding.

3. Why does the Council fund this?

The Council provide funding to the CABx as their provision of advice and support directly contributes to the outcome 'Our area will be a fairer and more equal place to live' included in both the Council's Corporate Plan and the Community Planning Partnership's Strategic Outcome Local Delivery Plan.

4. How long has the Council funded this organisation to deliver this Service? When did the Council first agree to fund this?

Falkirk Council has been providing funding to the CABx since the Council's inception in 1996.

5. Set out the funding provided by the Council over the last five years.

Year	Annual Funding	Support in Kind	One Off Support
19/20	£327,664	NA	NA
18/19	£377,664	NA	NA
17/18	£377,664	NA	NA
16/17	£377,664	NA	NA
15/16	£407,470	NA	NA

The above figures include the Armed Services Project delivered by Denny CAB and funding from the Health and Social Care Partnership.

B SERVICE DELIVERY

1. What does the organisation deliver and to whom?

The three Citizens Advice Bureaux in Falkirk delivers free, quality-assured, impartial advice on issues including debt, benefits, employment, housing and consumer rights. They serve some of the most vulnerable people in Falkirk, with

- 29% of clients stating that they are unable to work due to ill health or disability
- 27% of clients living in one of the 20% most deprived data zones (Scottish Index of Multiple Deprivation)

The CABx provide information and advice on a range of issues such as:

- Benefits – questions about entitlement, benefit checks, help with completing application forms and advice on how to challenge decisions
- Debt – how to manage your debts, improve your financial situation and maximise your income
- Employment – questions about terms & conditions, dismissal, wages owed, redundancy and discrimination
- Housing – questions about homelessness, housing allocation, repairs & deposits
- Consumer Rights
- Legal and Relationship Issues

2. Who and how many people directly benefit from the organisation?

The three Citizens Advice Bureaux in Falkirk have delivered free, quality-assured, impartial advice in response to 12,913 customer contacts and handled 30,973 issues from April 2019 to March 2020. The total client gain resulting from this advice was £5.1m.

Evidence shows that bureau services improve health, wellbeing and financial outcomes for clients with significant positive impact on those with who are most marginalised. Services also address wider Council's priorities, including through benefits to the local economy, reducing economic inequality and enabling wider participation

A report from Citizen's Advice Scotland showed that for every £1 in local authority funding the three Falkirk bureaux deliver cost effectiveness through:

- Further funding of £0.64 gained for Falkirk which helps to support specialist staff and local projects
- Additional resources to the value of £0.64 gained for Falkirk through the time of volunteers
- Additional resources gained for Falkirk through specialist knowledge accessed by being part of the Scottish Citizens Advice network
- Estimated savings of £1.78 to local and national government
- Wider economic and social benefits of an estimated £13.26 from improvements in health, wellbeing, participation and productivity
- Benefits to individuals of £14.80, such as increased income gained by accessing a benefit clients are entitled to and money saved by effectively managing a debt
- An estimated benefit for local businesses of £1.78 through purchases of goods and services supported by the additional gains for individuals and further funding gained for Falkirk

3. Set out what other similar and or complementary services are provided which are similar in function or support the same client / communities.

Falkirk Council's Community Advice Services also provide welfare benefits and debt advice. Having a choice of providers of these services in our area gives people options on where they go for support. There is growing demand for advice services, particularly due to changes in the social security system.

4. How does this organisation support the Council achieve its priorities?

The CABx support our aim to make Falkirk a fairer and more equal place to live by helping people to

- Maximise their income by making sure they are getting the benefits that they are entitled to
- Manage their money thought providing debt management support

Additionally the CABx participate in our Fairer Falkirk Partnership, inputting into the refresh of our poverty strategy and action plan, and the manager of the Grangemouth CAB chairs our Fairer Money subgroup.

5. How are users involved in the design and delivery of services?

Under the terms of the current Joint Working Agreement, the three Bureaux undertake user satisfaction surveys, which inform areas of improvement for the services they provide.

There are existing protocols for regular feedbacks to be received from clients on ongoing basis.

The new commissioning model is expected to promote greater service user participation in service design.

6. What geographical areas does this service / organisation cover within the Council area? – be specific.

There are three CABx within the Falkirk Council area. Denny and Dunipace - 24 Duke Street, Denny FK6 6DD, Grangemouth and Bo'ness - 1 Kerse Road, Grangemouth FK3 8HW and Falkirk - 27-29 Vicar Street, Falkirk FK1 1LL

Additionally, in 2018/19 a further 10 locations were covered on an outreach basis providing significant cover across the Council area:

- Denny Parish Church Hall
- Bonnybridge Health Centre
- Bonnybridge Community Centre
- Forth Valley Royal Hospital
- Tryst Community Sports Club
- Dawson Community Centre
- Hallglen Ettrick Dochart Centre (now closed)
- Falkirk & Clackmannanshire Carers Centre
- Westfield Park Community Centre
- Bo'ness, Dean Road Health Centre
- Slamannan Community Education Centre

C ASSESMENT OF PERFORMANCE

1. Set out current agreed performance information alongside previous years and future years. If there is any benchmarking information provide that.

	Denny & Dunipace		Falkirk		Grangemouth & Bo'ness	
<u>CLIENTS</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>
Contacts	2,731	3282	4,924	5221	4,256	4410
Contacts (CAD)	436	-	959	-	-	-
Issues Core (Excl. CAD & Non-Core)	4,097	6780	9,604	10762	11,934	13431
Issues (CAD)	704	-	1324	1927	-	-
<u>CLIENT GAINS</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>
Bureau – Benefit gains	£776,372	£882,730.13	£1,532,407	£2,154,125	£1,883,646	£2,163,040
Bureau – other gains	£ 95,212	£181,673.50	£26,724	£179,983	£65,466	£70,711
Bankruptcy/Trust Deeds	£34,169	£82,702.44	£610,877	£548,217	£4,738	£65,391
Number of Bankruptcy/Trust Deed	3		16	20	1	
<u>SOCIAL SECURITY BENEFITS</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>
Social Security Benefit Appointments	90	222	503	446	481	430
Home Visits	3	50	8	20	13	9
Benefit Checks	134	185	-	498	537	450
Benefit Take up Campaigns		0		-		-
Mandatory Reconsiderations	30	66	73	83	97	77
Appeals submitted to Tribunal	41	49	55	-	81	67
Services	23	33	20	20		-
Appeals Representation	17	20	22	15	41	32
Appeals Won	6	10	20	9	21	19
Appeals Lost	1	3	10	-	7	10
Appeals Adjourned			-	-		-
<u>Referrals – External Agencies</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>
FAWBASU	35	-	-	-	-	-
Confirmed Take-Ups	35	-	-	-	-	-
To External Agencies	-	-	168	144	35	-
Confirmed Take Ups	-	-	158	118	26	-
Food Bank	86	43	63	94	91	142
Confirmed Take-Ups	86	43	63	92	88	138
Salvation Army	-	-	-	-	-	-
Confirmed Take-Ups	-	-	-	-	-	-
Pension Wise	7	3	-	-	-	-
Confirmed Take-Ups	7	3	-	-	-	-
<u>VOLUNTEERS</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>	<u>18/19</u>	<u>19/20</u>
No. of New Volunteers	14	11	6	4	8	1
No. Active Volunteers	23	25	25	29	17	12
No. of Volunteers commencing training	3	7	6	1	8	-
	1	2	5	3	4	3
No. of Volunteers completing training	10	10	6	2	4	5
No. of Volunteers leaving Training Provided	261	501	99		39	

2. What aspects of performance should be highlighted? This should include any areas for improvement along with how performance will be included.

By the end of Q4, Advice from the three bureaux resulted in £5,199,895 additional benefits being received by clients in the Falkirk area. The previous full year total benefit gain was £4,192,425.

3. When was the last time the service was reviewed and what plans are there to review this?

The service was reviewed as part of our review of advice services in 2013. Additionally the effectiveness of the service was recently reviewed by Citizen's Advice Scotland resulting in the Delivering quality, value and positive impact for Falkirk report – November 2017.

The 2019/2020 joint working agreement (JWA) with the CABx allows us to monitor performance on a quarterly basis, through summary progress, and financial returns reporting provided by the three CABx.

4. Are there any improvements in efficiency or effectiveness that could be achieved?

The bureaux have already made significant savings over recent years through service efficiencies. The bureau funding for 2019/2020 has been reduced by £50k. This reflects a decrease in funding across the three bureau by ~14%.

We have worked with the three CABs and Citizen's Advice Scotland to consider the benefits of moving to a procurement model to provide this service. Following a review of the service delivery model used here and at other Councils, with input from Procurement, at present it has been concluded that moving to procure this service will not offer significant benefits to either the Councils or the CABs.

5. Is the organisation covered by any external regulation or inspection? If so please provide a link to the most recent inspection report noting any improvements etc?

The bureaux are regularly audited by Citizen's Advice Scotland.

D FINANCIAL / RISK ASSESSMENT OVERVIEW

1. Set out Falkirk Council funding as a % of the organisations budget. Including financial and in kind contributions.

Funding from Falkirk Council 2018/19 (including armed services project & health & social care)	Total £356,964 (includes Health & Social Care Partnership Grant)
Other funding	£481,414
Council funding as % of total	43%

2. List other sources of funding the organisation has and how much is provided by source.

Scottish Gov, Mental Health Project	£16,000
Scottish Government – FAWBASU	£52,046
Patient Advice & Support Service	£1,863
Citizens Advice Scotland - Armed Services Advice Project	£10,507
Citizens Advice Scotland - Aged Veterans Fund	£3,547
Citizens Advice Scotland - Welfare Mitigation	£41,333
Citizens Advice Scotland - Pension Wise	£50,978
Citizens Advice Scotland – Energy Best Deal	£7,727
Citizens Advice Scotland – Financial Health Check (Face to Face)	£28,755
Citizens Advice Scotland – Financial Health Checks (Telephony)	£61,403
Citizens Advice Scotland – Help to Claim (Face to Face)	£65,602
Citizens Advice Scotland – Help to Claim Telephony	£62,710
Citizens Advice Scotland – Short Term Debt	£8,738
Citizens Advice Scotland – EU Citizens Support Service	£3,000
Falkirk Health and Social Care Partnership – Help for Carers Project	£24,035

3. What is the amount of uncommitted reserves held by the organisation?

Uncommitted reserves Total £313,716 equates to 4.4 months running costs against core running costs.

Falkirk	£155,879
Grangemouth / Bo'ness	£74,533
Denny/Dunipace	£83,374

4. What proportion of operation cost do reserves represent?

Grangemouth/Bo'ness - Represents 35% of core running costs 2019/20, which equates to 4.2 months core running costs.

Falkirk – Represents 38% of core running costs 2019/20, which equates to 4.6 months running costs.

Denny/Dunipace – Represents 38% of core running costs 2019/20, which equates to 4.6 months running costs.

5. Last period of submitted audited accounts

Last audited accounts submitted were for period 2019/20.

6. What other services does the Council fund that are similar to this organisation including Council provision and to what level are those activities funded?

Falkirk Council has its own Welfare Benefit Advice and Debt Advice Service. This is a specialist service that offers free and confidential advice to anyone within the Falkirk area.

Falkirk Council also provide £38k funding per year to MacMillan Money Matters to provide benefits advice and support to people with a cancer diagnosis.

7. Future sustainability- Are there ways in which the organisation can improve resilience and decrease the money required from the Council?

The bureaux have already made significant savings over recent years through service efficiencies. Funding for 2019/2020 has been reduced by £50k across the three CABs. Further reductions in funding will result in a reduction in the level of service available to clients.

8. How can reductions in funding be achieved?

Further reductions could be delivered by further reducing the level of services delivered. This would be achieved by a loss of staff which will in turn result in a loss of volunteers through reduced resources available to support the volunteers. This will reduce the advice and support available to people in the area.

9. What is the risk to the Council if these services are not funded?

If these services are not funded there will be less support available to help people to manage their money and maximise their income. This is likely to increase poverty and in conjunction will impact on the mental health and well being of people living in the area.

This would prevent us delivering our outcome: our area is a fairer and more equal place to live.

10. Overall risk rating (Low/Medium/High). Please note this should note the risk to the Council not the organisation.

Medium

E CONCLUSIONS**1. Summary of the future activities of the organisation that will allow services to continue to be delivered.**

The three Citizen's Advice Bureau in the area and the Council have set up a joint working group which seeks out opportunities to work together, particularly where there are opportunities to secure additional funding.

Whilst the COVID pandemic mainly falls after this reporting period, the three area CABx have worked extremely hard to make sure their services are still available during the restrictions and that they can meet the increasing need for support.

Since March 2020 the three CABx have made significant investment in both technology and PPE, made possible through Central & Scottish Government grants. PPE purchases have made each office "Covid-compliant" to ensure that staff/volunteers can work in a safe environment and that they are prepared to restart drop in sessions for face to face when allowed. Technology has included laptops & telephone systems/licences to enable work from home and more access choice for residents.

The three CABx have maintained a service throughout the year. In the early stages of the pandemic staff worked from home to provide a reduced service by telephone and e-mail. Since around June/July, staff and volunteers have worked a mixture of at home and in the main office, and it has included limited face to face but strictly for the most vulnerable clients and where other contact methods were not possible.

Initially the service was provided by staff, as volunteers self-isolated either voluntary or because they were formally advised to do so. However, a gradual return by many volunteers means all 3 CABx are now providing a fuller service. Face to face continues to be provided on a strict basis of "only where necessary" and under strict conditions as per health and safety guidance.

CABx are providing a holistic service as normal, main enquiries continue to be benefits & debt (both provided mainly by telephone/video conference).

The above mentioned grants have enabled the CAB to provide a level of future proofing of their service by the instalment of PPE within the office (screens on desks etc.), and the investment in technology that enhances our ability to provide access to our service in different ways (telephone, video conference, email, and face to face). Increasing the ease of access reflects the increased use of technology by residents, and to mitigate the reduction of outreach services caused by the pandemic.

Staff and volunteers continue to do a mix of work at home and in the office, a format which it is expected will be here to stay.

F. Monitoring Officer Details

Name: Sally Buchanan

Designation: Fairer Falkirk and Community Planning Manager

Service: Corporate and Housing

Date of Report: 03/11/20

**FALKIRK COUNCIL - CORPORATE AND HOUSING SERVICES
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING STATEMENT
2019/20**

Organisation Name	Denny Citizens Advice Bureau
Project	Armed Services Advice Project
Agreement Dates	01 April 2019 to 31 March 2020
Name of Lead Officer	Ewan McWilliams

A OVERALL ORGANISATION AIMS

Summary of Key Aims & Objectives

The aim of the Armed Services Advice Project is to deliver information, advice, and support to members of the Armed Forces Community.

What is the purpose of the funding provided by the Council?

The funding provided by Falkirk Council enables Falkirk to maintain a face to face caseworker, which ensures Falkirk contributes to the national presence of support for the Armed Forces Community in Scotland.

Falkirk Council supports the Denny Citizens Advice Bureau to deliver the Armed Services Advice Project as its key contribution to the Armed Forces Covenant. The Covenant ensures that members of the armed forces community, serving and ex-serving, alongside their families in the Falkirk Council area face no disadvantage when accessing public and commercial services.

Why does the Council fund this?

Falkirk Council funds the Denny Citizens Advice Bureau to lead delivery of the Armed Service Advice Project across the Falkirk Council area; based in Denny and operating in Falkirk and Grangemouth Citizens Advice Bureaux.

The funding recognises the expertise Citizens Advice has in offering impartial and expert advice across a range of areas, many of which the armed forces community need access to.

How long has the Council funded this organisation to deliver this service? When did the Council agree to fund this?

Falkirk Council has funded the Armed Services Advice Project for seven years. Falkirk Council first agreed to fund the project on [20 June 2012](#).

Set out the funding provided by the Council for the last five years

<u>Year</u>	<u>Annual Funding</u>
2019/20	£ 18,000
2018/19	£ 18,000
2017/18	£ 18,000
2016/17	£ 18,000
2015/16	£ 18,000

B SERVICE DELIVERY**What does the organisation deliver and to whom?**

The Armed Services Advice Project provides a specialist advice and support contact point for current and past armed forces personnel and their dependants or carers. The range of information, advice and support includes:

- benefits
- debt
- employment
- finance
- health
- housing
- immigration
- legal
- relationships
- tax
- utilities

A key factor in the provision of the type of support offered, which focuses on recognition of the nuances that are specific to people from the armed forces community. The project also provides advocacy and representation support for veterans.

Who and how many people directly benefit from the organisation?

The armed service presenting the greatest proportion of clients to the Armed Services Advice Project is the Army (75.1 percent). This pattern is dominating and has not changed significantly since the beginning of this project.

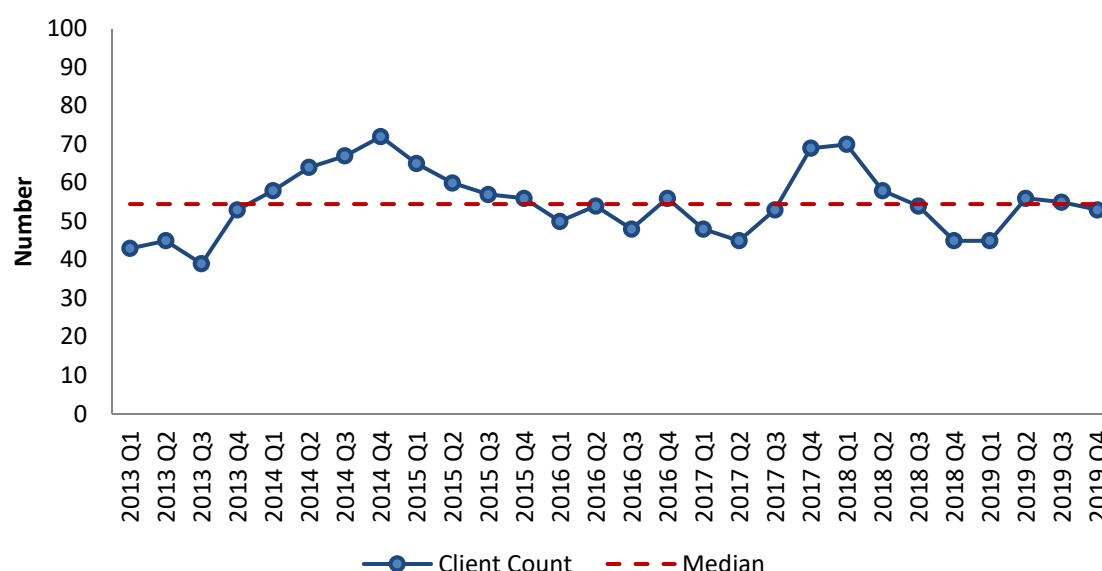
ARMED SERVICE	2019 (209)	Lifetime of Project
ARMY	75.1 % (157)	78.0 %
NAVY	8.13 % (17)	7.35 %
RAF	6.70 % (14)	5.92 %

TERRITORIAL ARMY 10.0 % (21) 8.71 %

The people who present to the service can be described as serving or ex-serving members of the armed forces or family members (dependants or carers). From this perspective, ex-serving members of the armed forces account for the largest proportion of clients (79 percent).

CLIENT TYPE	2019 (209)	Lifetime of Project
EX-SERVING	79.0 % (165)	78.4 %
DEPENDANT/CARER	18.2 % (38)	19.5 %
SERVING	2.87 % (6)	2.08 %

The run chart below shows the available historic and current client count data, which highlights the median number of clients seen by the Armed Services Advice Project in any single quarter is 54.5.



Summary Statistics

Mean ...54.9

Median...54.5

Mode ...45

Standard Deviation ...8.65

Set out what other similar and/or complementary services are provided that are similar in function or support the same clients/communities.

The service links with other national organisations that support the armed force community, making referrals out where those organisations are better placed to support the client on their need(s). The monitoring reports include reference to:

- Poppy Scotland
- Veterans UK

- SSAFA Armed Forces Charity (Soldiers, Sailor's, Airmen and Families Association)
- CAB Money Advice
- Welfare Benefits Advice
- Foodbank

How does this organisation support the Council achieve its priorities?

This organisation predominantly supports the Council's priority:

People

Reducing the impact of poverty on children and their families

The organisation achieves this by improving access to services for a defined group of people (Armed Forces Community) to ensure they do not face disadvantage due to their links to the armed forces. The impact of this support is often to increase household income and improve their basic standard of living.

Case Study

Outline

The client is a former soldier who presented with several debt issues. The client and her husband were struggling financially after both had to stop work due to illness earlier in the year. The client's husband was now back in work; however, the client's medical condition had not improved, and it was unlikely that she would be able to return to work in the short to medium term. Over the period that they had been unable to work they had fallen into considerable debt including over £2000 rent arrears. They were struggling and falling further into debt.

Assistance Given

The ASAP Support Officer ensured that the couple were in receipt of the correct benefits to maximise their income. During this process it was identified that the client had been injured during her Service and she was assisted to claim for a War Disability Pension. A request was submitted to the Ex Service Charities for financial assistance to help with the rent arrears. A referral was made to a CAB Money Advice Service.

Positive outcomes

Money Advice and support was accessed through the CAB to address the couple's debt. Funding was obtained from the Ex Service Charities to pay off the Rent Arrears and avoid court action. The client is being supported through the War Disability Pension claim process. Access to employment support will be available through the Ex Service Charities if the client decides to go back to work. The couple are now more positive about the future.

Are there any areas of improvement and/or efficiency that could be achieved?

A reduction in the grant from 2014/15 to 2015/16 lowered the average cost per client from £91.74 to £82.57. Any further reductions in grant would have to be

monitored to determine if there is a significant negative impact on a client's access to the service.

What areas does this organisation cover within the Council area?

The service is based in Denny Citizens Advice Bureau and operates out of Falkirk and Grangemouth Citizens Advice Bureaux to serve the whole of the Falkirk Council area. The service also provides outreach work, in appropriate safe places in the community.

C ASSESSMENT OF PERFORMANCE

Set out current agreed performance information alongside previous years and future years. If there is any benchmarking information, provide that.

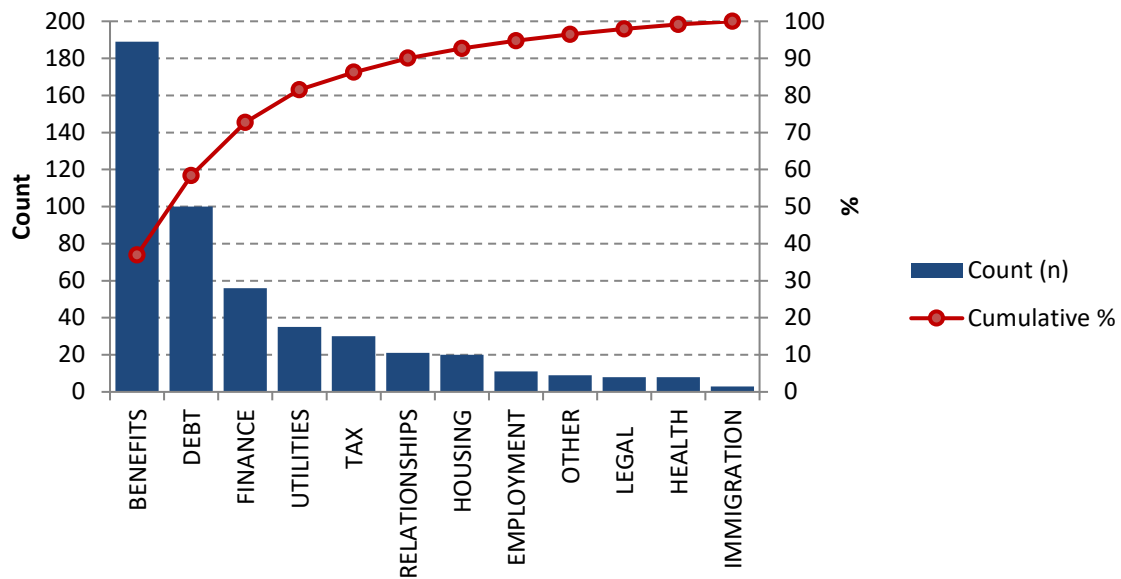
As indicated in part A, the aim of the Armed Services Advice Project is to deliver information, advice, and support to members of the Armed Forces Community.

There are no set targets for client engagement; most will self refer. The service aims to reach as many veterans, serving personnel and their families as possible who need impartial advice services.

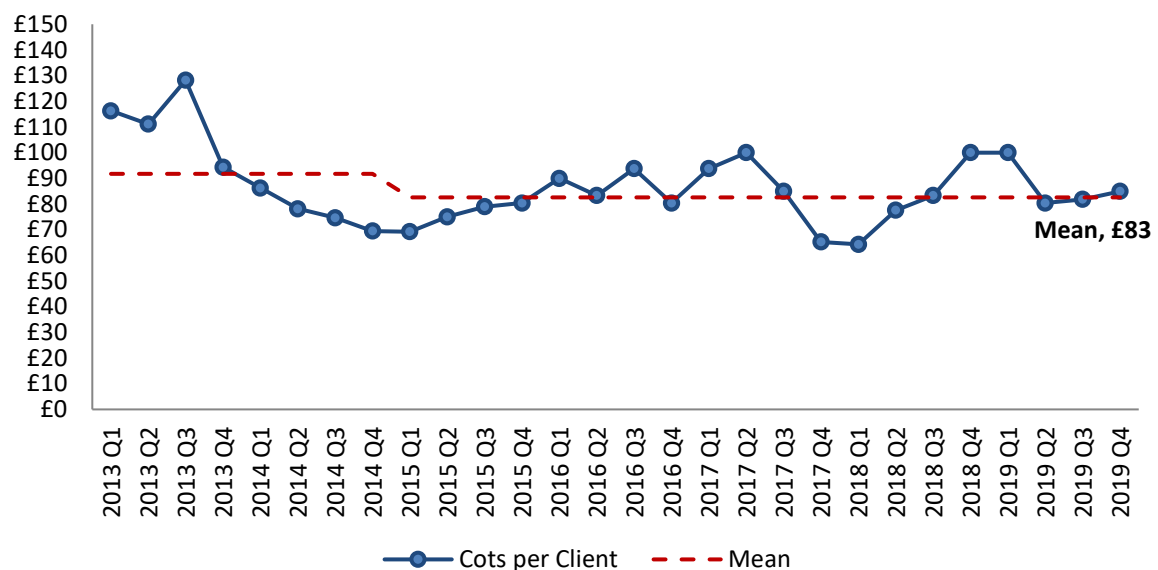
In 2019, 89 percent of clients were self referral cases, 5 percent from the national ASAP helpline and the reminder from other sources. The service reports that their predominant client base consists of single men, aged 45-59, with an army background.

When a client presents their case may span a range of enquiry topics; however, the top three most frequent occurrences are Benefits, Debt and Finance. These three areas consistently account for between 70-80 percent of all enquiry topics where people sought information, advice, or support.

The chart below highlights the range of enquiries from 2019, which clearly indicates the most prominent topics Benefits, Debt and Finance, representing a cumulative 73 percent.



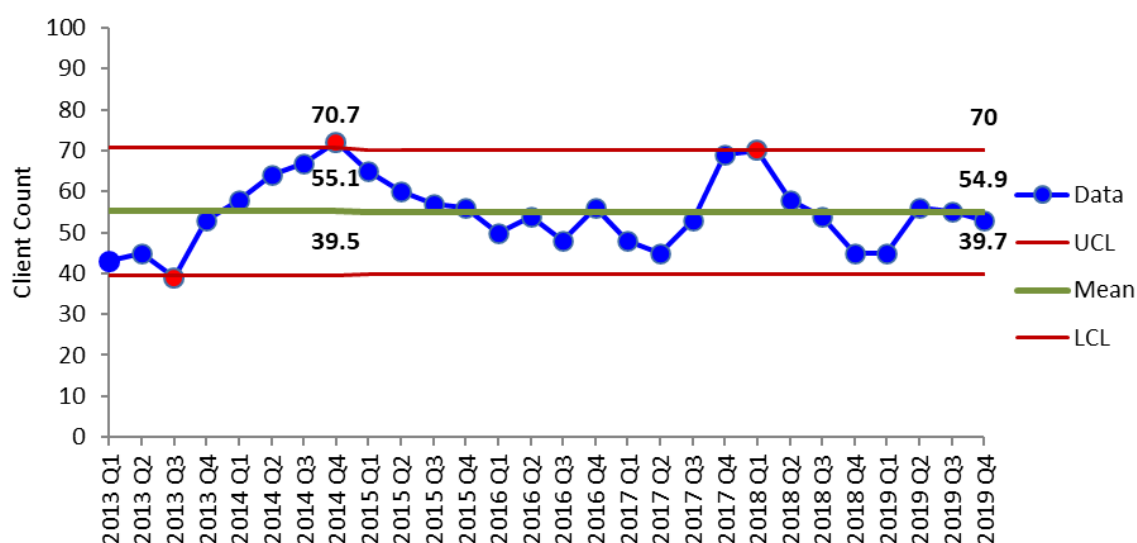
A basic element of the top enquiries (benefits, debt, finance, utilities, and tax) is money. The fact that issues with money issues account for over 86 percent of enquiries is significant.



The chart above highlights the cost per client based on the level of grant provided to the organisation. The current average cost per client seen is £83.

Are there any aspects of performance that are causing concern or need to be improved? If so, what are they and what are the plans for improvement?

When you factor in the reduction in funding, post 2015 the process can be described as stable exhibiting only common cause variation. There was a single instance in Q1 2018 when the number of clients seen was marginally higher than expected. During 2019, the level of service we can expect has been predictable, remaining within the expected range.



When was the last time the service was reviewed and what plans are there to review this?

The service was last reviewed on Tuesday 25 February 2020.

A quarterly monitoring review process between Falkirk Council, the Veteran's Champion and the service provider is planned to take place throughout the duration of the project.

D FINANCIAL / RISK ASSESSMENT OVERVIEW

Set out Falkirk Council funding as a % of the organisations budget, including financial and in-kind contributions.

Funding	£	%
Falkirk Council	18,000	57
Other Funds	13,577	43
Total	31,577	100

List other sources of funding the organisation has and how much is provided by source.

Funding	£	%
C.A.S. ASAP	10,098	32
C.A.S. Aged Veteran Fund	3,479	11
Total	13,577	43

What is the amount of uncommitted reserves held by the organisation?

£102,407 (2018/19)

What proportion of operation cost do reserves represent?

5.5 months running costs based on 2019/20 costs, in line with the policy of directors to follow best practice and maintain 3 to 6 months running costs, taking into account the time taken from making applications to alternative funders until decisions are taken.

Last Period of Submitted Audited Accounts

2018/19

What other services does the Council fund that are similar to this organisation, including Council provision and to what level are those activities funded?

The Council supports the Denny, Falkirk and Grangemouth Citizens Advice Bureaux serving the Council area with core funding for the provision of mainstream advice services to the general public.

How can reductions in funding be achieved?

Any reduction in funding would align to reduce accessibility of the service. The number of hours of support aligns to the available funding, so any reduction will reduce the available hours of support and likely limit the caseload capacity of the caseworker.

What is the risk to the Council if these services are not funded?

The purpose of this service is to ensure this specific client group face no disadvantage (be treated fairly) when accessing public or commercial services, predominantly in the Falkirk Council area. This is what Falkirk Council promised by signing the Armed Forces Covenant in 2012.

Currently [Falkirk Council](#) relies on this service as their primary method to help support veterans and service personnel, in addition to signposting to the national charities: Veterans Scotland, Veterans UK and Combat Stress.

If Council chooses not to fund this service, they would have to ensure that its processes to access its public services are adequately robust enough to recognise and not disadvantage this client group.

If the Council acts in a way incompatible with the spirit of the Armed Forces Covenant, then the Ministry of Defence would remove Falkirk Council from the Employer Recognition Scheme.

Overall Risk Rating (Low/Medium/High)

Low

E CONCLUSIONS	
<p>Summary of the future activities of the organisation that will allow services to continue to be delivered.</p> <p>There are no proposed changes to service delivery. The grant funded service provided by the Armed Services Advice Project is stable and operating within the expected range.</p> <p>The key enquiries centre on financial support to a predominant client base of single men, aged 45-59, with an army background.</p>	
F COMPLETED BY	
<u>Name</u>	Ewan McWilliams
<u>Designation</u>	Members' Services Coordinator
<u>Date</u>	14 April 2020

FALKIRK COUNCIL
FOLLOWING THE PUBLIC POUND ANNUAL REPORTING STATEMENT 2019/2020

Organisation Name	Partnership between Stirling & Falkirk, Councils, NHS Forth Valley and Macmillan Cancer Support
Project	Forth Valley Macmillan Money Matters Project
Agreement Dates	1 April 2019 to 31 March 2020
Name of Monitoring Officer	George Paul
A OVERALL ORGANISATION AIMS	
1. Summary of key aims & objectives of organisation	
<p>To offer easily accessible information and advice on money matters and financial resilience to patients with Cancer and their families and to increase income available to this client group.</p> <p>The project seeks to maximise income to sufferers of Cancer and their families living in the Forth Valley area. Provision includes information, advice and assistance on money matters relating to Social Security Benefits, tax credits, the maximisation and management of income and personal debt. The aim is to promote financial wellbeing and tackle financial and social exclusion.</p> <p>The project provides information, advice and assistance up to and including representation at tribunal on social security benefits. Workers are based in Stirling and Falkirk.</p>	
2. What is the purpose of the funding provided by the Council?	
<p>This is Falkirk Council's contribution to the partnership. In return 1.6 officers are based at the Forum covering all the referrals for people with cancer for the Falkirk Council area.</p>	
3. Why does the Council fund this	
<p>This is a specialist service which has direct links with health professionals, meaning people get referred at the point of diagnosis and are seen quickly. The project advisers are trained to understand the experiences and needs of cancer patients and their families and to give expert advice to people experiencing these difficult circumstances. They are also able to refer on to other Macmillan services.</p> <p>The project advisers identify other important issues for patients, their carers and families 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 for debt advice; the DWP Visiting Service; and local Carer Organisations to further support clients.</p>	

The team also have “alternative office” status that allows them access to the DWP system and to verify forms and evidence gathered.

**4. How long has the Council funded this organisation to deliver this Service?
When did the Council first agree to fund this?**

Since 2009. Macmillan Cancer Relief funded the project in full from 2006 but this was always on the understanding that the Councils and the Health Board would pick up full cost moving forward.

5. Set out the funding provided by the Council over the last five years.

Year	Annual Funding	Support in Kind	One Off Support
19/20	£38,000	£2,620	
18/19	£38,000	£2,620	
17/18	£38,000	£2,620	
16/17	£38,000	£2,620	
15/16	£40,000	£2,620	

B SERVICE DELIVERY

1. What does the organisation deliver and to whom?

Financial Inclusion advice for people suffering from cancer, their carers and families. This includes checking to ensure that all benefit entitlement is claimed. Help is also given to challenge decisions not to award benefit including representation at tribunal.

The project has direct links with health professionals, which means that people diagnosed with cancer get referred at that point and are seen quickly by the Macmillan Team.

The project advisers identify other important issues and makes referrals to a number of partner organisations that offer further support.

The service is for anyone within the Falkirk Council area who has an active cancer diagnosis (or is a carer or family member).

2. Who and how many people directly benefit from the organisation?

For the financial year 2019-2020, the project helped support 1100 people in the Forth Valley area. The geographical split was Falkirk 53% Stirling 28.5% and Clacks 18.5%. The overall income generated was £2,953,575.

For Falkirk, 581 people were supported and £1,573,983 of additional income secured.

This means that for every £1 that Falkirk Council has invested there has been a return to our community of just under £39 as well as providing the support to some of our most vulnerable people in their health crisis.

3. Set out what other similar and or complementary services are provided which are similar in function or support the same client / communities.

Falkirk Council has its own Welfare Benefit Advice Service. This is a specialist service but has a wider reach to all people with disabilities and long term health conditions (not just

those with cancer).

This service would not be able to prioritise cancer patients within the tight timescales that the project operates to.

4. How does this organisation support the Council achieve its priorities?

The project contributes to the Council's Poverty Strategy by providing support to some of our most vulnerable people and improving their financial security by maximising the income of their households, improving benefit uptake and debt management.

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. Benefit income is claimed from central government and utilised within local communities. Increasing the income available and reducing the debt helps improve the quality of life and reduces some stress related to this illness.

5. How are users involved in the design and delivery of services?

Through customer feedback forms and returns

6. What geographical areas does this service / organisation cover within the Council area? – be specific.

The whole of the Falkirk Council area

C ASSESMENT OF PERFORMANCE

1. Set out current agreed performance information alongside previous years and future years. If there is any benchmarking information provide that.

Key performance target for the project to achieve each year is to support 400 people with cancer in the Falkirk Council area. This project exceeded this in 18-19 by supporting 582 people and in 19-20 supporting 581. In the current year the team secured an additional £1,573,983 of benefits income.

2. What aspects of performance should be highlighted? This should include any areas for improvement along with how performance will be included.

The staff have already exceeded the target set to support 400 clients in the Falkirk Area with cancer. They also generated £1,573,983 of additional income for this group. For every £1 invested by Falkirk Council there has been a return of just under £39 to the local community.

3. When was the last time the service was reviewed and what plans are there to review this?

The service is reviewed annually and the service agreement is signed annually.

There is a quarterly management group meeting of all the partners

4. Are there any improvements in efficiency or effectiveness that could be achieved?

Due to the increasing number of referral levels the management group agreed that the Project would concentrate on cases where a diagnosis of cancer has been received and the client is receiving treatment / palliative care (including all DS1500 cases – where death can be reasonably expected within 6 months). All referrals where treatment has been completed, including clients returning to the service for assistance to complete benefit review forms, would be referred onto partner organisations as well as Macmillan's Direct Services.

5. Is the organisation covered by any external regulation or inspection? If so please provide a link to the most recent inspection report noting any improvements etc?

Lead is Stirling Council. The workers are supported and supervised by Diane Connock

D FINANCIAL / RISK ASSESSMENT OVERVIEW

1. Set out Falkirk Council funding as a % of the organisations budget. Including financial and in kind contributions.

£40,620 from Falkirk Council which represents 23.5% of funding. However, 53% of the projects referrals come from the Falkirk Council area.

In 2019/2020 this project received £38,000 from Falkirk Council – plus in kind support (accommodation, desks, computers, phones for 1.6 officers approx. £2,620). 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) giving a total funding package amount of £172,620. This funding is used to employ and manage 7 staff across the project area (1.6 based in Falkirk here at the Forum). The pattern of work activity for 2019-2020 remains in line with the previous years with an approximate 53/28.5/18.5% split across Falkirk, Stirling and Clackmannanshire respectively.

MacMillan provides financial support in kind in the form of advice and support to staff, training and guidance and access to the other Macmillan cancer support services.
<p>2. List other sources of funding the organisation has and how much is provided by source.</p> <p>Stirling Council is the lead for the project (and the employing agency).</p> <p>As an organisation, Macmillan Cancer Support raised £230.8 million in 2018 (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 £195 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.</p>
<p>3. What is the amount of uncommitted reserves held by the organisation?</p> <p>TBC.</p>
<p>4. What proportion of operation cost do reserves represent?</p> <p>TBC.</p>
<p>5. Last period of submitted audited accounts</p> <p>18/19</p>
<p>6. What other services does the Council fund that are similar to this organisation including Council provision and to what level are those activities funded?</p> <p>Falkirk Council has its own Welfare Benefit Advice Service. The Council also funds the 3 local CABs. These are seen as specialist services but these have a wider reach to all people with disabilities and long term health conditions (not just those with cancer).</p> <p>These services are extremely busy and would not be able to prioritise cancer patients within the tight timescales that the project operates to.</p>
<p>7. Future sustainability- Are there ways in which the organisation can improve resilience and decrease the money required from the Council?</p> <p>The current contribution from Falkirk Council is vital in keeping the partnership and the project functioning. The contribution made of £40,620 represents great value to the Council. It is equivalent to 23.5% of the project funding yet 53% of the projects clients come from the Falkirk council area. In real terms Stirling Council and the NHS are subsidising the workers based here. Falkirk Council is getting excellent value for its money.</p>
<p>8. How can reductions in funding be achieved?</p> <p>Breaking up the partnership and putting extra funding into our own Welfare Benefits Service or the 3 CABs. However this would remove the specialist provision and is unlikely to offer better value for money given the resources that we get for the current funding.</p>

9. What is the risk to the Council if these services are not funded?

The project board has indicated that any further reduction in funding may result in the partnership being dissolved and the service stopping. The work would have to be transferred in-house and would no longer be subsidised. In real terms this will cost the Council more to deliver.

Funding from Falkirk, Stirling and NHS Forth Valley will be crucial to the delivery of the project. Funding for 2019-2020 has been agreed at the same rates as the previous year from NHS Forth Valley, Stirling Council & Falkirk Council. Any reduction from Falkirk Council moving forward will have serious consequences for service delivery in the Falkirk area. Other risks being faced by the organisation include the full-service roll out of Universal Credit across Forth Valley, along with an increase in the number of clients being transferred from Disability Living Allowance to Personal Independence Payment.

In 2019/20 the Macmillan project dealt with 581 Falkirk Council residents (budgeted target was 400). The project has achieved 45.5% more than budgeted for. If the service was lost nearly 600 people annually would have to find an alternative service and the income generated would fall dramatically and income would be lost to the local economy.

This would result in some of our most vulnerable people not having the same level of support in their health crisis.

10. Overall risk rating (Low/Medium/High). Please note this should note the risk to the Council not the organisation.

Low

E	CONCLUSIONS
<p>1. Summary of the future activities of the organisation that will allow services to continue to be delivered.</p> <p>Due to the increasing number of referral levels the management group agreed that the Project would concentrate on cases where a diagnosis of cancer has been received and the client is receiving treatment / palliative care (including all DS1500 cases where death can be reasonably expected within 6 months). These are seen as the most vulnerable of clients. All referrals where treatment has been completed, including clients returning to the service for assistance to complete benefit review forms, would be referred onto partner organisations as well as Macmillan's Direct Services.</p> <p>The Covid 19 pandemic has had an impact on the project. People are being interviewed by phone or on video platforms and forms are being completed. Home Visits have stopped at present.</p> <p>For the first 6 months of the financial year 2020-2021 the project helped support 403 people in the Forth Valley area and the overall income generated has been £1,310,523.</p> <p>For Falkirk, 233 people (57.8% of people seen – up from 53% last year) were supported and £701,768 of additional income secured.</p> <p>This means that for every £1 that Falkirk Council has invested in the 6 months there has been a return to our community of £35 as well as providing the support to some of our most vulnerable people in their health crisis.</p>	
F. Monitoring Officer Details	
Name: George Paul	
Designation: Team Leader, Community Advice Services	
Service: Corporate & Housing (Revenues & Benefits)	
Date of Report: 16 April 2020	