

Report of the Deputy Chief Executive

CITIZENS ADVICE BROXTOWE – GRANT AID 2019/201. Purpose of Report

To consider the outturn position in respect of the Service Level Agreement with Citizens Advice Broxtowe following the commitment of a three-year grant funding settlement from 2018/19 in accordance with the provisions of the Council's Grant Aid Policy.

2. Grant Aid Application

On 12 July 2018 this Committee approved grant aid of £73,750 to Citizens Advice Broxtowe, including £10,000 towards the annual rental of accommodation in the Council Offices. The resolution included a commitment to award grant aid at this level in both 2019/20 and 2020/21, subject to a suitable Service Level Agreement being in place. This three-year funding settlement was seen to provide some much-needed stability for Citizens Advice Broxtowe and give it a platform to lever in additional funds from other sources.

Citizens Advice Broxtowe has now provided an outturn position in respect of the Service Level Agreement to 31 March 2019. This is provided in the appendix.

3. Financial Position

The committed award of £73,750 (including £10,000 rental) to Citizens Advice Broxtowe in 2019/20 will be the second year of this three-year funding agreement. The overall budget for grants to voluntary organisations includes provision for this committed award.

Recommendation

The Committee is asked to CONSIDER the outturn report from Citizens Advice Broxtowe and RESOLVE that the second year of the three-year funding settlement be released as agreed in 2018/19.

Background papers

Nil

APPENDIX

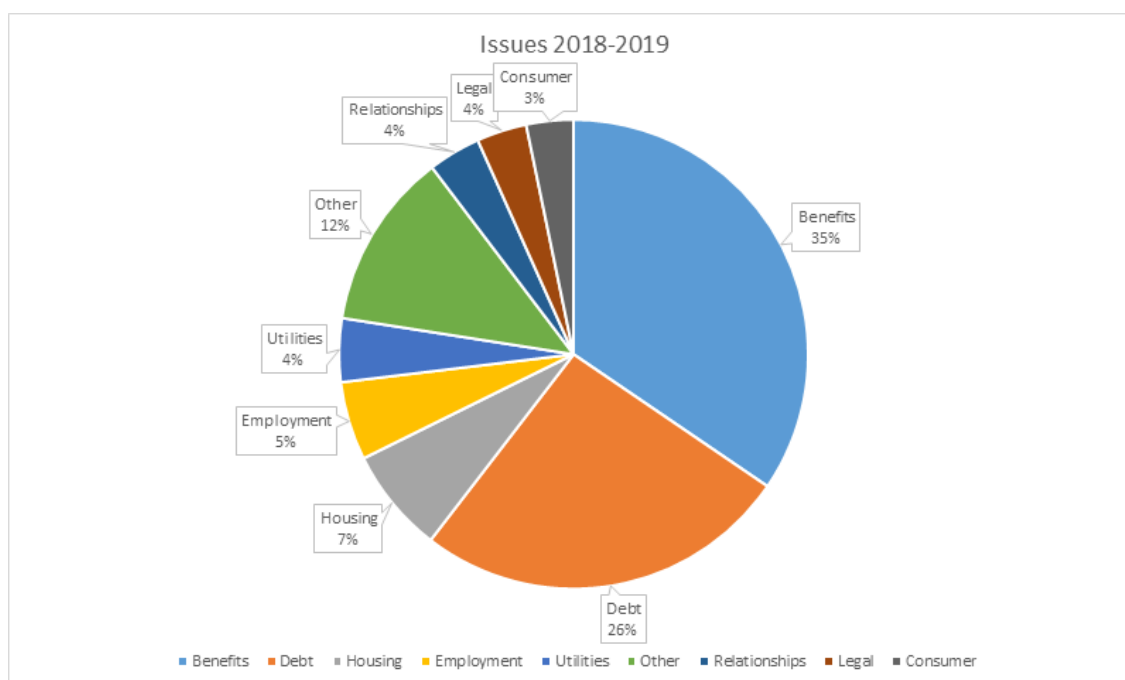
CITIZENS ADVICE BROXTOWE

1. Background

Citizens Advice Broxtowe (CAB) provides advice and support to the public on a variety of issues including debt, housing, welfare rights, employment and legal matters. CAB was established in 2004 following the merger of the former Beeston and Eastwood bureaux to create a district-based structure with operations that are based at the Council Offices in Beeston and the Library in Eastwood, with some funded outreach sessions also being provided at the Stapleford Care Centre.

2. Summary Achievements 2018/19

In 2018/19, CAB has assisted 7,179 clients on a wide range of enquiries. CAB has provided a summary analysis of the 13,503 enquiries that were handled between April 2018 and March 2019. The majority of these contacts related to debt and benefits matters with the remaining enquiries being classified as housing, employment, signposting, legal, relationships, financial, consumer, utilities, health, tax, travel, immigration, education and other. CAB has also assisted clients in accessing £2.63m of additional benefits, which makes a huge difference to their wellbeing as well as supporting the local economy.



In September 2019, CAB underwent a triennial inspection visit from Citizens Advice. This audit was passed, with CAB being awarded the Advice Quality Standard (AQS) Certification for a further three years.

3. Staffing

CAB currently employs 20 paid staff in 22 different roles. During the last 12 months it recruited 13 new volunteers to its establishment and is currently grateful to the support of 50 volunteers who give their time freely in providing over 17,000 volunteer hours in the year at an estimated value of £311,000.

Due to new funding from the Department of Work and Pensions (DWP) for the 'Help to Claim' (Universal Credit) service, CAB was able to offer employment to five of its current volunteers.

Although CAB is run by trustees who serve on the management committee, the day-to-day operation is overseen by the Chief Executive who is assisted by part-time staff including a Development Manager, Operations Manager and Session Supervisors at both Beeston and Eastwood. Other paid officers include administrative support at each location; a training and quality officer; an outreach worker; a part-time specialist housing worker and part-time debt workers. It should be noted that CAB is legally required to provide a recognised Session Supervisor for each session run at any location.

In 2017/18 CAB reported on the appointment of a Development Manager to help sustain the charity in the long-term as obtaining funding gets increasingly difficult and competitive. Although this position has brought in additional income streams, CAB is still has challenges in maintaining a balanced budget and not having to use substantial reserves in order to retain its current service.

Total staff costs in 2018/19 are forecast as £290,900. Total employee costs in 2017/18 were £254,329, an increase of 14% on the previous year.

4. Accommodation

In January 2009, CAB moved its Beeston operation into the Council Offices. Lease terms were agreed for the accommodation at a market rental of £10,000 per annum. CAB previously paid a nominal rental for their former premises and the extra rental cost of accommodation in the Council Offices significantly increased their premises costs. Having only limited financial resources, CAB is unlikely to be able to sustain this charge.

5. Financial Position

CAB has provided its Financial Statements (draft) for the year ended 31 March 2019 for scrutiny. CAB separates its accounts between a restricted fund and an unrestricted fund. For the year ended 31 March 2019, total income generated amounted to £320,764 which mostly related to grants with £118,640 being in respect of unrestricted funds. The majority of unrestricted funding was provided by this Council and Nottinghamshire County Council (£34,000). Significant restricted funding was also received from the Financial Inclusion Fund (£70,528, Citizen's Advice (£61,130) and the Henry Smith Charity (£30,800).

Total expenditure amounted to £359,631, including £172,781 charged to the restricted fund. A breakdown of costs for the year is included in appendix 2.

Total funds decreased to £323,475 (before the pension liability) with cash at bank and in hand amounting to £325,406. The CAB reserves policy is to maintain a minimum level of general reserves equivalent to around three months operating costs plus any closure costs should this become necessary. A General Fund Reserve of £87,000 has been set aside for this purpose.

6. Previous Grant Awards

The Council has supported CAB for many years with the grants awarded in the past four years being as follows:

	Grant Awarded £
2018/19 (including £10,000 rent)	73,750
2017/18 (including £10,000 rent)	73,750
2016/17 (including £10,000 rent)	73,750
2015/16 (including £10,000 rent)	73,750

The grant of £73,750 awarded to CAB in 2018/19 represented 44% of the Council's overall grant aid budget.

7. Request for Grant Aid

This Committee, on 12 July 2018, approved grant aid of £73,750 to CAB, including £10,000 towards the annual rental of accommodation in the Council Offices. The resolution included a commitment to award grant aid at this level in both 2019/20 and 2020/21, subject to a suitable Service Level Agreement being in place.

CAB has provided an outturn position in respect of the Service Level Agreement to 31 March 2019 (appendix 2) and has requested the release of the second year funding of £73,750 in 2019/20 (being £63,750 towards general expenses and £10,000 towards the annual rental of accommodation in the Council Offices).

8. Consideration

Members are asked to consider the outturn report from CAB and resolve that the second year of the three-year funding settlement (£73,750 per annum) as agreed in 2018/19 can be released. A provision for this commitment is earmarked within the overall grant aid budget.

APPENDIX 2

SERVICE LEVEL AGREEMENT 2018/19

Citizens Advice Broxtowe has provided the following information in accordance with the terms of the grant previously awarded by Finance and Resources Committee on 12 July 2018 and the Service Level Agreement for 2018/19.

SCHEDULE A – OUTPUT MEASURES *(Figures for 2017/18 are given in italics)*

Ref	Outcome Area	Total (Apr-Mar)
6.1	Number of new issues (problems) dealt with	13,503 <i>(12,397)</i>
6.2	Number of clients receiving support during the year	7,179 <i>(6,544)</i>
6.3	Average amount of debt handled per client seeking debt advice	£8,731 <i>(£8,895)</i>
6.4	Estimated amount of benefits gained for clients seeking benefit advice	£2.63m <i>(£2.25m)</i>
6.5	Please list the top five advice needs and the number of new social policy issues recorded for each (in brackets) <ul style="list-style-type: none"> • Benefits • Debt • Housing • Employment • Relationships 	4,736 (27) 3,558 (5) 993 (8) 743 (7) 601 (0)
6.6	Number of staff employed as at 31 March 2019	20
6.7	Number of volunteers available as at 31 March 2019	50
6.8	Number of new volunteers recruited in 2018/19	13
6.9	Number of new social policy issues dealt in 2018/19	61
6.10	Number and value of volunteer hours worked in 2018/19	+17,000 £311,000

6.11 Breakdown of service users and volunteers by gender, age, ethnicity and disability for 2018/19:

Description	Service Users		Volunteers	
<u>Gender</u>				
Male	3,087	43%	20	33%
Female	4,092	57%	30	67%
<u>Age</u>				
19 and under	33	1%	-	-
20-49	1,063	15%	5	10%
50-64	925	13%	24	48%
65 and over	509	6%	21	42%
Not stated	4,649	65%	-	-
<u>Ethnicity</u> (No. of people who consider themselves to be):				
White British	2,403	34%	45	90%
Black British	113	1%	1	2%
White Other	249	4%	1	2%
Black Other	0	0%	1	2%
Asian	113	1%	2	4%
Chinese	9	0%	-	-
Other ethnic group	263	4%	-	-
Not stated	4,029	56%	-	-
<u>Disability</u> (No. of people who consider themselves to be):	994	14%	1	2%

6.12 Please provide a summary analysis to indicate the extent to which the services of CAB have benefited clients.

The Citizens Advice service is independent and provides free, confidential and impartial advice to everybody regardless of race, sex, disability sexuality or nationality. CAB is not simply an advice agency, it is an organisation that helps people to resolve their problems. CAB does this in two ways, through advice and through bringing about policy change. Citizens Advice recognise that people often have many problems which impact on one another and they help people to tackle them.

In 2018/19 CAB handled over 13,500 enquiries on a wide range of subjects including debt, housing and homelessness, family problems and employment issues. Debt and welfare benefits accounted for around 60% of all enquiries.

The service makes a real contribution to the most deprived individuals and communities and CAB makes a real difference to people's lives. In 2018/19 CAB helped clients gain £2.63 million of additional benefits which makes a huge difference to the client's well-being but it also adds real value by supporting the local economy as in turn there is more money available to be spent locally.

CAB works in partnership with local service providers in the voluntary and statutory sectors and provides outreach advice services within the community targeting our service towards people most likely to be socially excluded.

- 6.13 Please provide a summary analysis of client surveys, to indicate the level of satisfaction with the services of CAB. Also tell us about any changes you have made/plan to make as a result of feedback received.

Each year CAB carries out surveys with its clients which give an indication of how satisfied they are with the service. The survey has changed during the year to fall in line with national membership of Citizens Advice. CAB is well above the national average on all the questions. The results of the latest survey are as follows:

Question	Positive Response	National average
Rate your overall experience of the service	93%	87%
How easy did you find it to access the service?	88%	82%
To what extent did the service help you find a way forward?	90%	85%
To what extend is your problem now resolved?	77%	77%
How likely would you to be recommend the service?	93%	88%

- 6.14 Please provide feedback from volunteers around the level of satisfaction with the training and support they have received, and any specific outcomes achieved e.g. moving into paid work:

In the last year CAB has recruited 13 new volunteer advisers. As a result of the training provided and the skills and confidence gained whilst working with CAB, eight volunteers have gone onto paid work or further education, both externally and within the CAB service.

- 6.15 Please tell us about some of your work around improving the policies and practices that affect people's lives. Tell us about any changes which have been made both locally and nationally in relation to the top five advice needs:

The top five advice needs are benefits; debt; housing; employment; and relationships. Campaigning aims to improve the policies and practices that affect people's lives and is one of the aims of the service. As a charity and being part of the national network CAB has a huge amount of insight and data about the problems its clients and their wider communities face. Through research and campaigns, CAB uses this insight to:

- help us research issues further
- gathering evidence of problems that need resolving
- campaign to get decision makers to change policies and practices.
- prevent issues from recurring.

Universal Credit – New Help to Claim Service in Broxtowe

The 'Help to Claim' service offers support for people from starting a Universal Credit (UC) claim through to receiving their first full payment, via face-to-face, the dedicated UC free-phone line, web chat with trained advisers or by accessing CAB public access computers in reception or the public site web pages. As well as self-referring or following on from previous phone advice and web chat, people can be referred to CAB from the other LCA's, Jobcentre, local authority housing officers and/or voluntary and community sector partners. CAB also has advisers located in Beeston and Heanor Jobcentres as it works in partnership to meet client needs.

CAB continues to actively participate in the Broxtowe Welfare Reform Working Group and is now delivering these additional services to support UC claimants with greater partnership working with the Council and DWP.

Part of the funding was used for the creation of 31 Best Practice Leads (BPL) across England and Wales. Each BPL is matched to a Jobcentre Plus district and Broxtowe was successful in obtaining the BPL one year contract for the Lincolnshire, Nottinghamshire and Rutland district. The role of the BPL is to gather and share information about the performance of UC and the Help to Claim service, build and support relationships with relevant stakeholders, support local Citizens Advice, and develop and share ideas and best practice.

The BPL will be gathering intelligence and insight on how UC and Help to Claim is working across the Jobcentre Plus district and will share this intelligence with relevant partners including Jobcentres, local Citizens Advice and national Citizens Advice. Through this the BPL will help local Citizens Advice across the district to understand UC and how best to support clients. Highly effective relationships will be developed with relevant district stakeholders including local Citizens Advice and DWP.

Where appropriate, support will be given to local Citizens Advice with their relationships at a local level with Jobcentres, councils and other voluntary sector organisations.

CAB Campaign Work 2019/20

Research and campaigns remains a core part of the work of Citizens Advice, delivered by dedicated staff and committed volunteers. This work helps ensure CAB can resolve more issues for clients, and address the underlying causes so that the issues do not continue to affect clients.

Research and campaigns is one of the twin aims of our service. It aims to improve the policies and practices that affect people's lives.

As a service CAB has a huge amount of insight and data about the problems our clients and their wider communities face. Through research and campaigns, CAB uses this insight to:

- help us research issues further
- influence decision makers to change policies and practices
- campaign to get decision makers to change policies and practices.

Research and campaigns gives CAB the opportunity to widen its impact, allowing it to help those who may not be able to access advice services, prevent issues from recurring and therefore help with demand and capacity issues.

The Research and Campaigns team work with other local Citizens Advice and advice agencies to collect this evidence and contribute to policy discussions about how to improve the lives of Broxtowe residents.

CAB has continued to participate in the Nottinghamshire Research and Campaigns Cluster Group that includes all local Citizens Advice offices across the county. CAB also feeds into national campaigns such as the UC improvements that have been made over the last year as a direct result of the evidence gathered across the Country.

The CAB Research and Campaign team in Broxtowe is headed up by a Trustee and an Action Plan produced for each financial year. During 19/20 CAB will continue to look at evidence around how UC is affecting Broxtowe residents as well as disability issues, income security and homelessness.

- 6.18 Please provide case studies to indicate some of the outcomes achieved for clients to evidence the top advice needs:

** Please note that names have been changed to protect confidentiality.*

Case Study 1 – Employment Advice

David* suffered a head injury. David returned to work after a period of recuperation but found that he had suffered some memory loss and was finding it difficult to complete work tasks. He was still receiving treatment from doctors, counsellors and physiotherapists. His employer was unsympathetic and tried to dismiss David on ill-health grounds (although the letters David received indicated that he was actually being made redundant).

CAB contacted the employer and through negotiation arranged for David to receive a redundancy settlement that he was happy with. Following support with benefits and after two appeals, CAB managed to obtain Employment and Support Allowance payments (support group). This means that David will work with the Job Centre to find suitable employment that will allow for his health issues.

Case Study 2 – Housing Advice

Philip* had lived in a housing association property for 14 years with his mother. Unfortunately she passed away and left Philip in a vulnerable housing position. The housing association told Philip that he could not succeed the tenancy and was therefore being evicted. Philip suffers from mental health disabilities and alcohol misuse and is very vulnerable, especially since his mother died.

The CAB Housing Adviser worked intensively with Philip to prove that the existing tenancy agreement had clauses within it that meant he could stay in the property and take out a new tenancy agreement in his name. CAB raised a complaint with the housing association which was upheld.

Working with the CAB Welfare Benefits Adviser, Philip obtained Housing Benefit, Council Tax Support and Personal Independence Payments. This was a significant step as it meant that Philip could afford the tenancy on his own and would not become homeless.

This case demonstrates the essential ongoing need for technical housing advice in Broxtowe and the intensive work needed to prevent homelessness. In total CAB gained an additional £12,800 per year in benefits, enabling Philip to remain in the home he loves and where he feels safe.

Case Study 3 – Benefits Advice

Sandra* had worked all her adult life and was working as a Cleaner when she was diagnosed with cancer. During her year-long treatment Sandra was signed off sick from work and was barely managing on statutory sick pay. The side effects of the cancer meant that Sandra could no longer bend her back sufficiently to return to her manual job role. Sandra came to CAB to discuss her way forward and the options available.

The cancer diagnosis and continued ill-health was causing Sandra emotional stress. On top of this Sandra was worrying about money and how to pay the bills including her rent.

CAB carried out a benefits check and looked in detail at the household situation. Sandra's partner had already retired and was claiming his state pension. CAB established that Sandra could claim Pension Credit, Housing Benefit and Council Tax Support. CAB also advised Sandra to look into using the Big Difference Scheme via Severn Trent to reduce her water bill.

Overall CAB helped Sandra to claim £5,106 in additional income per year. Her stress levels have since been reduced and Sandra can now concentrate on recovery and future health and well-being.

Case Study 4 – Money Advice

June* was referred to CAB by one of its partners, Broxtowe Women's Project. Her partner had recently left following domestic and financial abuse issues. June had been left with significant debts all run up by her ex-partner and he had also taken all the money out of their joint accounts. June was left with nothing to live on. The debts were a mixture of priority and non-priority debts including rent arrears, overdrafts, council tax arrears and credit card debts.

With June now being single, CAB helped her to apply for benefits in her own name. CAB made offers of payments to all her creditors to get her finances back on track. CAB also issued vouchers for the food bank to ensure she could eat whilst her benefits were sorted.

When CAB first met June she was emotional, suicidal and desperate. Following advice and assistance from CAB and with the help of the Broxtowe Women's Project, June now says she can look forward to the future. She has started to apply for work and is optimistic that she can turn her life around.

SCHEDULE B – FINANCIAL MONITORING INFORMATION

In accordance with the Service Level Agreement, Citizens Advice Broxtowe has provided the Council with financial monitoring information. The final outturn for the year ended 31 March 2019 is as follows:

	Budget 2018/19 £	Actual 2018/19 £	Variance £	<i>Actual 2017/18 £</i>
<u>Income</u>				
Income	192,678	320,764	(128,086)	261,558
Total Income	192,678	320,764	(128,086)	261,558
<u>Expenditure</u>				
Salaries and Pensions	271,423	290,888	19,465	254,329
Volunteers/Staff Expenses	13,018	13,834	816	4,595
Office Costs	26,142	33,717	7,575	38,483
Premises Costs	12,585	14,541	1,956	13,652
Governance/Audit costs	1,200	5,515	4,315	1,392
Depreciation	0	1,136	1,136	0
Payment to Partners	10,000	0	(10,000)	7,585
Total Expenditure	334,368	359,631	25,263	320,036
Deficit/(Surplus)	(141,690)	(38,867)	102,823	58,478

Variances can be explained as follows:

- Additional income from NCC for generalist advice service (3 year agreement)
- Additional income from BBC to prevent homelessness
- Increased donations – combined from trust funds, general donations from the public, fundraising and successful capital bids.
- Additional income to run the UC Help To Claim Service across Broxtowe
- Additional staff costs as we continue to grow the service to cope with demand.
- Additional capital costs for new staff (additional phone lines/computers etc.)

CAB continues to have a small predicted deficit budget in 2019/20.