

## Main Grants 2017-18 report

<b>Name of organisation</b>	<b>Lewisham Citizens Advice Service</b>
<b>Date of meeting</b>	<b>28 September 2016</b>
<b>Names and positions of attendees</b>	<b>Verena Hefti, Trustee Rachel Braverman, CEO James Lee, LB Lewisham, Head of Service Winston Castello, Community Enterprise Manager</b>

<b>Group Name:</b>	<b>Total</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>
Total funding received 2015-16	£375,69 5.25	N/A	£125,23 1.75	£125,231. 75	£125,23 1.75
Total funding to be received 2016-17	<b>£500,92</b> <b>7</b>	£125,231 .75	£125,23 1.75	£125,231. 75	£125,23 1.75
<b>Outcomes</b>	<b>Support</b>				
	<ol style="list-style-type: none"> <li>1. Clients enabled to take the next step towards resolving their problems themselves.</li> <li>2. Clients will be better able to manage their own financial affairs, including budgeting, accessing credit appropriately, lowering fuel bills and maximising their income, thus reducing their risk of falling into debt and fuel poverty</li> <li>3. Clients will be empowered to make their own claims and take charge of their financial affairs. They will be less at risk of rent arrears, other debts and poverty, through being able to make appropriate claims quickly and correctly</li> <li>4. Clients problems resolved or moved towards resolution, through our generalist advice service. Outcomes will include clients accessing correct benefit entitlements, setting up affordable payment plans for debts, getting debts written off, stopping bailiffs action, stopping court action, securing and maintaining housing, solving employment issues, getting compensation etc. We will raise at least £750,000 on behalf of our clients through increased benefits, debts written off, compensation etc.</li> <li>5. Clients problems resolved or moved towards resolution, through our generalist advice service. Outcomes will include clients accessing correct benefit entitlements, setting up affordable payment plans for debts,</li> </ol>				

getting debts written off, stopping bailiffs action, stopping court action, securing and maintaining housing, solving employment issues, getting compensation etc. We will raise at least £337,500 on behalf of our clients through increased benefits, debts written off, compensation etc.

6. Clients' debt issues resolved or moved towards resolution. Outcomes include setting up payment plans at affordable rates, debts written off, bankruptcy and Debt Relief Orders. We will raise at least £67,500 on behalf of our clients through increased benefits, debts written off, compensation etc.

<b>Outputs:</b>	2015-16 Target	2015-16 Q2	2015-16 Q3	2015-16 Q4	2015-16 Total	% Achieved	2016-17 Target	2016-17 Q1	2016-17 Q2	% Achieved TD
5,250 clients offered Assisted Information through our reception service at our main premises. Reception will be available each weekday for 2-hour sessions, morning and afternoon. Total 360 sessions per year	5,250	1,649	1,502	1,634	4,785	91%	7,000	1,372		20%
90 unique clients offered help with financial capability through a series of monthly sessions held at voluntary and statutory partner organisations. In addition, 12 frontline staff will be enabled to help and support their service users with financial affairs.	90	32	27	49	108	120%	120	35		29%
600 clients helped to access digital technology through sessions at our hub at Downham Leisure Centre.	600	130	223	279	632		800	191		85%

<p>Trained volunteers will help clients to</p> <ul style="list-style-type: none"> <li>- access advice and information through Advice Guide and other appropriate online advice sources (e.g. Shelter, Turn2Us)</li> <li>- make their own online applications and reports e.g. changes in circumstances for housing benefit, applying for Blue Badges, making straightforward benefit applications .</li> </ul> <p>Volunteers will also make appropriate referrals, where clients need more in-depth advice. We will offer 4x3-hour sessions per week. Total 144 sessions per year.</p>										
<p>2,625 unique clients offered advice through Gateway diagnostic/triage interviews, appointments and casework. We will run 3 face to face and 4 phone Gateway sessions per week. Each session will run for 2 hours. Total 252 sessions per year. We will also offer a minimum of 1,300 appointments per year.</p>	2,625	888	825	883	<b>2,596</b>	<b>99%</b>	3,500	896		<b>26%</b>
<p>75 unique clients will be offered specialist debt advice through appointments booked from our various sessions as detailed above</p>	75	19	14	41	<b>74</b>	<b>99%</b>	100	31		<b>31%</b>

## 1. Remove funding from under-performing groups/those performing least well

Have you achieved at least 90% of the agreed reporting outputs and outcomes in all quarters since the start of the programme?

The CAB has achieved the majority of its principal outcomes and, during the course of the year, has provided 4,785 individuals with assisted information. Individuals also receive support to improve their financial capability. This has been delivered in conjunction with voluntary and statutory partner organisations.

Other key outputs have included:

- 632 individuals received assistance to access advice through digital channels – including assistance with housing benefits, change of circumstances reporting and Blue Badge applications;
- 2,596 individuals received support via gateway diagnostic interviews, against a target of 2,625.

Have you achieved all of the wider outcomes outlined in the initial grant application?

Lewisham Citizens' Advice Services' wider outcomes relates to interventions to enable clients to take steps towards solving their problems themselves. The organisation seeks to empower individuals by providing information and advice.

Other outcomes include getting "compensation" of at least £750,000 for clients through increased benefits and debts written off or direct compensation. The organisation's report states this outcome has been achieved.

The organisation promotes a number of initiatives aimed at reducing poverty, including campaigns on debt, home heating and utilities provider switching.

If no to either of the above:

- what are the mitigating factors?
- what plans are in place for improving performance?
- what progress has been made against actions agreed with your Development Officer?

For the output related to clients offered assisted information through a reception service, the organisation states that the lower than forecast numbers are due to under-reporting. Lewisham CAB record reception clients on a 'daybook' report on their Petra CRM system, which records issues, rather than individuals. They recognise that this leads to over reporting on the number of individuals helped, as most come in about more than one issue. In the last year, therefore, they have recorded the number of individuals, using a manual system. On their Petra system, they have recorded a total of 11,078 issues, indicating each client needs information on an average of 2.3 issues.

What local support/evidence of need can you identify for the work you are undertaking?

Changing policy within welfare services has impacted on all grant-aided advice services. This has been compounded by many public services being increasingly subject to channel

shifts resulting in services increasingly only being available online. Many residents with limited digital skills have, as a result, sought assistance from advice services. The CAB's approach to these individuals is to provide them with the skills to access the services to avoid individuals becoming dependent on advisers in the long term.

## 2. Negotiate reductions and seek alternative funding streams

Are there any proposals that you can put forward that will deliver significant saving against current expenditure? This can include capital investment to change your delivery/business model.

CAB, as the largest grant funded advice organisation in Lewisham, will be playing a pivotal role in the re-design of the Council-supported advice services. The organisation's planned move to the Leemore Advice Hub will result in improved working arrangements, including the telephone triage service. It is anticipated that these changes along with other improvements in advice services will enable the organisation to maintain a high level of service delivery.

What alternative funding streams are you already pursuing?

Lewisham Citizens' Advice Services attract funds from a number of different sources, including £250,000 from Capitalise to provide finance related advice. The CAB also receives funds from Lewisham Homes, London Quadrant and other sources of funding. Into the future, the organisation is looking to broaden its advice services, possibly working with schools or children's centres as a way of improving access to advice services for parents and carers.

Are there any other funding streams that you can identify that the council can support you to access?

CAB will be seeking to apply to deliver other advice-based services commissioned by the London Borough of Lewisham. The organisation is registered on the Council's Pro-Contract commissioning portal and has indicated its willingness to participate in market development events.

## 3. Work with groups to consider mergers or asset sharing

Are there any organisations doing similar work to you in the borough who you may consider sharing resources or merging with? Who have you considered/approached?

CAB is **an integral part** of the advice services review which will involve service redesign and a focus on a single point of access for service users. This will involve close collaboration with all other advice agencies. This, combined with the CAB's planned move to the Leemore Centre, will greatly enhance the potential for collaborative activities. All staff will work from a common base rather than three separate locations. CAB will also have the potential to work with other Leemore-based organisations which is likely to provide further opportunities for partnership working and case management of service users.

Are there other groups in the local area that you could share resources with even if they are delivering a different type of service? Again, who have you considered/approached?

The move to Leemore will further rationalise the CAB's premises requirements and enable collaborative work to share resources across organisations. This is likely to include the CAB using its expertise for recruiting and training volunteers for the benefit of all advice partners.

What support might you need to move these suggestions forward?

The CAB has worked very closely with Lewisham officers involved in community premises, including a significant input into the co-design of the advice hub. Through its contract for Advice Lewisham on behalf of the advice partnership, the CAB plays a leading role in coordinating partnership activities. The current work being undertaken by Advice Lewisham will necessitate a revision in the management arrangements for Advice Lewisham and this will require further discussion with Council officers to ensure that Advice Lewisham continues to work to the agreed priorities and focuses its work on implementing the requirements of the advice review.

#### 4. Pro-rata reductions across all groups

What would a 25% cut in your grants look like in service delivery terms? What are the wider impacts?

The organisation has analysed the potential impact of a 25% cut and has stated that their intention would be to minimise the impact on service users. Service re-design will aim to gain efficiencies and other measures could include making savings around back office functions.

Have you modelled this cut and developed an action plan for its implementation?

The organisation's trustees have discussed the potential impact of a 25% cut and are aware that an action plan is required.

#### Conclusion

##### **Any other comments / areas discussed**

CAB is looking to broaden the range of services it offers, including bidding for Lewisham Council commissioned advice provision. They are also considering offering outreach services to schools and children's centres.

**Conclusion and recommendation****A pro rata reduction in grant is recommended.**

However, officers will work with the trustee board to ensure that service design complements the implementation of the re-designed advice initiative across the borough. The organisation will be working as part of the advice review and will be contributing to the common gateway for clients. The recommendation is therefore conditional on the full involvement of CAB in the review and the organisation's commitment to jointly plan and deliver advice provision across the borough.

**Equalities groups disproportionately impacted by recommendations**

Ethnicity:		Pregnancy / Maternity:	
Gender:		Marriage & Civil Partnerships:	
Age:		Sexual orientation:	
Disability:		Gender reassignment:	
Religion / Belief:			

**Commentary and potential mitigations:**

The organisation works across the borough and with all parts of the community. There are no particular groups that would be disproportionately affected by a reduction in services. The advice review and the re-prioritisation of services will aim to address any adverse impact on service users.