



**Policy, Finance and  
Development**

**Tuesday  
21 July 2015**

**Matter for  
Information and  
decision**

Title: **Advisory Services in the Borough**

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## **1 Introduction**

This report is to provide Members update on the current already extended contract with Citizens Advice Bureau (CAB), which comes to an end at the end of July 2015 and proposals for delivery of wider advisory services following a request by this Committee to map out all advisory services in the Borough.

## **2 Recommendations**

1. Members are asked to give authority to sign up to District wide European funding bid led by Melton Borough Council
2. Members are asked to consider the two options of service delivery offered by CAB and support the officer recommendation that Option 2 is followed.

## **3 Information**

This Council went through a formal procurement exercise in 2010 and entered into a contract with CAB to deliver a wide ranging advisory service for the local residents. The contractual arrangements are for local services for local people from a base in South Wigston (Bassett Centre) and surgeries at Oadby.

In 2013, CAB services were successful in their bid to provide advisory services to Leicester and Leicestershire and launched their new Customer Contact Centre in Leicester.

The CAB services was part funded by the Leicestershire County Council(LCC) and this funding came to an end last year and following an agreement from all 7 Districts it was agreed to top up the funding to CAB to allow them to seek alternative ways of delivering services.

Following this new area of work this Council agreed to extend the CAB contract for a further two years and supported the customer contact centre through a small top up fund as agreed by all Districts and supported by LCC.

The 7 district alongside LCC led on a model of performance framework which was agreed to enable all authorities to receive quarterly reports of CAB's performance in each district.

CAB performance reports were shared with Members and the information when analysed and compared to other Districts showed mixed results. Whilst some individual case studies showed some good results for individuals, however the overall view of residents accessing the service claimed that they were not receiving the services that they anticipated and expected, in a timely manner.

In addition, through the Member Query system of the Council a number of Members were being presented by their constituents that surgery times were altered and that CAB services were sometimes difficult to access.

To ensure that there continues to be a robust advisory service and one that actually specialises in financial matters this Committee had sought to carry out a mapping exercise of the various advisory services operating in the Borough.

The then newly appointed Community Engagement Officer undertook this exercise and correlated the services with the equality agenda in terms of the diversity of services available in the Borough.

The mapping exercise confirmed that there are a number of services which our residents access and whilst, some of these are small entities the nature of services and support they provide to residents is of high quality and personalised to the needs of the residents and more importantly immediately accessible with very little bureaucracy involved in accessing the services.

As part of the mapping exercise views and opinions were sought from the front line officers of the Council who have worked with various advisory services on the prepared list and confirmed that in all cases the outcomes were balanced and matters resolved by all parties to support the residents.

The main gaps identified through this exercise are of money advice and qualified financial expertise in both private and personal financial situation but also the complex welfare benefits advice which this Council can not currently provide.

As a matter of courtesy, CAB were notified of a potential withdrawal of funding for advice services by this Council and were asked to tailor a service to the specific needs of this Borough in line with the vision of our customer contact centre and they have responded by offering two options as part of their services delivery specifically related to financial assistance.

CAB is keen to work with other partners in the Borough and recognise and support the other partners operating in the Borough and have set out two options with costs.

### Option 1

- Fully co-located service in Oadby and Wigston Council offices where the Council charge for CAB to pay for desk space on the days they run a service but have permanent IT and storage facilities on site. Volunteers retained at Council offices and a branch is in operation
- 2 days service per week, one at the Council offices and one at the new customer service centre, Service Leader on site
- 1 further outreach service per week at a different location, supervision by phone
- Contact Centre Service 5 days per week

Additional services secured by CAB but not funded by Oadby & Wigston Borough Council

- 1 day per week Money Advice
- 1 day per week Pensionwise service
- CAB arranged Pro Bono sessions from solicitors

### **Estimated Cost £30,673**

This option builds on the work carried out by Leicestershire CAB in other parts of the county to co locate face to face services at the heart of the community. Full advice services will be targeted, ensuring that the most vulnerable are prioritised, with advice concentrating on debt, welfare benefits, housing, and employment and relationships. A full call centre service with e-mail and web chat will be provided alongside the face to face service. Provision of outreach at an agreed location to improve client access

### Option 2

- Volunteers are absorbed into the Blaby Branch and services to Oadby and Wigston are operated purely on an outreach basis
- 2 outreach sessions per week, one at Oadby and Wigston Council Offices and one at the new Customer Services centre.
- Contact Centre Service 5 days per week

Additional services secured by CAB but not funded by Oadby & Wigston Borough Council

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### **Estimated Cost £19,191**

Members will note that CST is in progress and unlikely to up and running with our own services embedded until final quarter of this financial it is proposed that

Members give consideration to Option 2 of the CAB proposal for a period of 12 months to allow a full trial of a targeted financial assistance and enable a full evaluation of the outcome of the contract whilst supporting newly appointed customer services staff in offering basic advice and appropriate signposting.

### Future Delivery Models

Through the strategic Customer Services Transformation (CST) group, the lead officer, Finance Manager, jointly agreed to look at best use of the Customer Services centre and consideration has been given to proposal to sign up a bid led by Melton Borough Council a bid for European Structural Investment Fund (ESIF) funding under the Holistic Social Inclusion strand of Thematic Objective 9 (TO9) – “Promoting social inclusion and combating poverty”.

Melton have named their model of advisory services delivery “Me and My Learning” which is based on the ethos:

- Supports people to achieve digital, financial and social independence (from public services)
- Wherever possible helps people to gain sustainable employment or better paid employment.
- Uses a triage/assessment process to identify individual needs and barriers.
- Provides an individual, agreed, holistic and co-ordinated journey (to achieve independence).
- Brings partner organisations together under a single co-ordinated “umbrella”
- Features local community involvement and ownership.

There is a total of £5.238m funding available for the three years of the programme for the Holistic social inclusion strand of TO9. This is made up of ESIF funding and matches funding provided by Big Lottery.

Attached at Appendix 1 are further details.

Managers from all front line services, that is, Customer Services, Housing, and Homelessness. Revenue and Benefits and Rents team leaders have attended workshops and met with various partners to look at how best this can be delivered in our Borough.

To progress this, resources have been identified and will be considered once the customer services centre is fully operational.

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| Implications    |  |
|-----------------|--|
| Financial (PL)  | CR5 Effective utilisation of resources/assets. In delivering services                      |
| Risk (APM)      | CR4 Reputation.  |
| Equalities (AC) | An Equality Impact assessment will be necessary and conducted when officers are available. |
| Legal (AC)      | No significant implications  |

## **APPENDIX 1**

### **Me and My Learning – Building Better Opportunities bid**

Melton BC will be leading a bid for European Structural Investment Fund (ESIF) funding under the Holistic Social Inclusion strand of Thematic Objective 9 (TO9) – “Promoting social inclusion and combating poverty”.

#### **Bid specification**

“... to support disadvantaged people towards and into employment and increase social inclusion. It will implement new approaches and pilot innovative delivery methods to provide holistic support to people. It is important that this approach is based around the needs of each individual, rather than the agencies offering the services.”

The bid has to be delivered across the whole of the Leicester and Leicestershire LEP area. This of course means that irrespective of whoever the successful bidder is they will have to deliver services in each District area.

#### **Funding available**

There is a total of £5.238m funding available for the three years of the programme for the Holistic social inclusion strand of TO9. This is made up of ESIF funding and match funding provided by Big Lottery.

#### **Bidding process**

This is a two stage bidding process with stage one, outline, bids to be submitted by mid-day on 3 August. Success at stage one will then require a detailed bid to be developed and submitted. The detailed bid stage will include agreement regarding the amount of funding Districts will receive, their plans for implementation and the outputs they will deliver.

#### **Basis of the bid**

The bid is based on the roll-out of the Me and My Learning ethos/approach across Leicester and Leicestershire so that, by the end of the funding period (December 2019) the approach will be operating across the whole area.

Me and My Learning:

- Supports people to achieve digital, financial and social independence (from public services)
- Wherever possible helps people to gain sustainable employment or better paid employment.

- Uses a triage/assessment process to identify individual needs and barriers.
- Provides an individual, agreed, holistic and co-ordinated journey (to achieve independence).
- Brings partner organisations together under a single co-ordinated “umbrella”
- Features local community involvement and ownership.

## **Role of Districts**

District authorities will take the lead across the County for rolling out the Me and My Learning approach in their respective area. It is likely that a consortia of VCS organisations will lead implementation in the City with the City Council as a partner.

## **Commitment required by Districts**

Assuming that the bid is successful, Districts will be committed to developing and implementing the Me and My Learning approach in their area. The speed and scale of the implementation will be for each District to determine and will reflect local circumstances. Districts will be responsible for delivering their proportionate share of the programme outcomes (but see below).

## **Outputs**

The bid specification calls for minimum outputs over the three years of the programme of at least:

- 1,100 people engaged in activities to improve their work readiness
- 16% of people move into employment
- 26% of people who were economically inactive when joining the project move into job search on leaving

Between June 2014 and March 2015 Me and My Learning in Melton actively engaged with 362 people and moved 53 into employment. On the basis of this the bid will look to specify a higher level of outputs whilst ensuring that this will be absolutely achievable.