

2. Citizens Advice South Somerset (CASS)

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Purpose of the Report

This report seeks the approval of District Executive on the funding of Citizens Advice South Somerset (CASS) for the 2017-2018 financial year.

Public Interest

- CASS is the major provider of free, confidential, independent and impartial advice in the South Somerset area. Advice services are quality assured under the national Citizens Advice Membership Scheme
- In addition, the organisation aims to improve policies and practices that affect people's lives
- CASS has been serving the community of South Somerset since 1961

SSDC supports CASS to ensure that people across South Somerset are able to access free, impartial and expert advice; to ensure that isolated and vulnerable people in the district are able to access services fairly and not be disadvantaged by their circumstances; to ensure that policies are improved; to deliver services to some of those people most in need; to meet a range of objectives in our Council Plan.

In addition to financial support SSDC have also assisted CASS with premises, having co-located them in Petters House along with the Council's own Welfare Advice Team as a step towards creating an Information and Advice hub.

Background

At the 3 December 2015 District Executive meeting, the Council approved grant funding of £121,730 for CASS for the financial year 2016/17.

The decision to fund was taken following the outcome of an extensive review of CASS's performance that was conducted between the months of March and July 2015. The review comprised a comprehensive evaluation of CASS services and an analysis of performance data and other historical and anecdotal matters.

The following activities were undertaken as part of the review:

- i. Funding per head of population comparison against 25 other council areas
- ii. An analysis of factors with the potential to influence future information and advice priorities
- iii. Analysis of CASS's 2013/14 and 2014/15 performance data benchmarked against 7 comparator CABs and their respective funding authorities
- iv. Funding Options Appraisal

The results of the review were reported to DX at the December 2015 meeting and were instrumental in giving members the confidence to renew the funding for 2016/17.

A new CEO, Angela Kerr, joined the organisation around the time that the review commenced. Under her leadership CASS has made significant improvements in its culture, performance, volunteer recruitment & retention and development of new initiatives & projects that meet the emerging needs of South Somerset residents.

CASS Purpose

CASS is an independent charity and part of the Citizens Advice network across England and Wales. They work in partnership with other agencies and groups. CASS provides free, confidential advice to help people resolve their problems and also campaign to raise awareness about the big issues that affect people's lives. They provide advice on a wide range of issues including benefits, debt, employment, consumer, housing and family relationships. Their goal is to help everyone find a way forward no matter what problem they face.

Accessing Advice

- Walk-in sessions

Customers can attend one of CASS's walk-in advice sessions at the main office in Yeovil or at one of their outreach venues located in the following towns/venues:

Yeovil, Chard, Crewkerne, Wincanton, Ilminster, Martock, Ryalls Park Surgery

- Adviceline

A telephone help service is also provided. Customers can call 03444 88 9623 between 10:00am and 4:00pm Monday to Friday.

CASS has also joined up with the other Citizens Advice services in Somerset to improve the delivery of telephone services. When a resident from South Somerset dials the number, their local dialling code will be identified and, in the first instance, their call will be routed to Citizens Advice South Somerset. If there is no one available in South Somerset the call will go to another Citizens Advice service in Somerset.

Clients who are deaf or hard of hearing can call the Citizens Advice Text Relay service on 03444 111 445.

For consumer problems, customers can access the National Citizens Advice consumer helpline on 03454 04 05 06. The helpline is open Monday to Friday 9:00am to 5:00pm.

- Email

Advice can also be received via email through completion of an online inquiry form. CASS aim to respond to email enquiries within 3 working days. However, if a client's questions require more complex advice, they will be invited to attend one of the walk-in sessions at the Yeovil office or at one of the outreach locations.

- Skype

CASS is running a pilot project using Skype for clients in the Somerton area.

- Self-serve

Clients with access to the internet may be able to self-serve by finding the information they require on the Citizens Advice website at: www.citizensadvice.org

- Debt drop-in sessions

CASS also holds debt specialist debt drop-in sessions, with a specialist debt adviser, at their Yeovil office on the last Thursday of every month between 10:00am and 1:00 pm.

Summary of Service Achievements

2015/16

The last full year for which there are figures is 2015/16. The following is a summary of key performance achievements from that year.

- CASS saw a **15% increase** in the number of clients they helped compared with the previous year.
- **5,743** clients helped across the organisation in general advice, casework and special projects
- **18,507** advice issues dealt with
- **26,271** client contacts
- **£1.5 million** debt rescheduled & managed
- **2,464** clients helped with Benefits and Tax Credits enquiries
- **909** clients helped with debt
- **643** clients assisted with money skills and personal budgeting
- **78** clients received energy advice
- **59** clients received Surviving Winter grants
- **173** clients awarded Local Assistance Scheme grants with **152** children in families helped
- **209** fuel & food parcels awarded with **78** children in families helped
- An **11%** increase in volunteers over the year with **40** volunteers active in advice roles
- Over **7,900** hours of volunteer time with an estimated value of **£75,000**
- Delivered over **1,000** hours of free training

2015/16 Impact

At the point of engaging with CASS nearly **3 in 4** clients said their issues caused difficulties in other parts of their life eg:

- **2 in 3** clients felt stressed, depressed or anxious
- Nearly **1 in 3** had less money or escalating financial difficulties
- Nearly **1 in 3** felt their physical health had got worse

Following receipt of a service **4 in 5** clients said CASS improved their lives e.g.:

- **4 in 5** felt less stressed, depressed or anxious
- **1 in 2** had more money or control over their finances
- Nearly **1 in 2** said their physical health had improved

2016/17 Performance

A 6-month contract monitoring meeting was held with the CEO and Chair of Trustees of CASS on the 13th October 2016. There was also a pre-meeting held with Leader Cllr Ric Pallister and Portfolio Holder Cllr Sylvia Seal.

Performance information for the first 6 months of 2016/17 has also been provided to members through a series of presentations to Area Committees in November 2016 and January & February 2017.

Delivery of the SLA requirements has been good with more than satisfactory performance over the first 9 months of the 2016/17 financial year.

The following table provides a comparison of performance data from quarters 1 to 3 of 2016/17 with the corresponding three quarters from 2015/16. For illustrative purposes a sample of performance data has been presented here from what is otherwise an extensive suite of reporting requirements.

As can be seen from the table, benefits and debt are by far and away the 2 biggest issues that CASS deals with and Area South returns the largest number of clients.

The number of 'Gateways' (initial contacts) by telephone has dropped significantly compared with last year. CASS has also reported that the percentage of calls answered is currently 46%.(although this changes monthly dependant on demand and performance). This is in no small part due to the introduction of the Somerset Adviceline¹ service, which is not working as effectively as it was originally planned. This is not unique to CASS however and to illustrate the wider problem, Mendip CAB now has to fund an additional 20 hours of dedicated call centre staff to increase their call handling rate. Furthermore, too many non-advice related enquiries are coming via the telephone. CASS is not being complacent about the issue and are exploring if, and how, technology can be used to filter out the non-advice related calls.

Members will also notice that in some areas client volumes have reduced when compared with 2015/16. However, lower volumes aren't necessarily associated with a dropping off in performance. Clients are increasingly presenting with more complex cases with a multiplicity of issues, which are taking volunteer advice workers significantly longer to resolve.

Other notable service achievements in the first 9 months of 2016/17 include:

- A successful staff restructuring driven by a focus on improving frontline services
- The introduction of the new Citizens Advice membership scheme with monthly monitoring by Citizens Advice nationally
- The introduction of a new locally agreed Customer Charter setting out clearly the quality of service that clients can expect
- The overall increase in clients seen
- More effective use of volunteer advice workers' time through the introduction of Casework Supervisors in Petters House reception to triage clients and filter out those not needing advice
- Improved customer access via outreach services in Chard, Crewkerne, Ilminster, Martock and Wincanton and the Skype pilot for clients in the Somerton area
- Improved partnership working with SSDC Welfare Advice service
- A consistent increase in the number of volunteers recruited and retained

Given the limitations of using only quantitative data for performance monitoring, it has been discussed and agreed that the suite of reporting requirements will be reviewed when drawing up the 2017/18 SLA ensuring that the statistics required are useful and add value. We will also look at much greater use of qualitative outcomes and narrative that better demonstrate the work of CASS and its impact on people's lives.

¹ Adviceline' is a networked telephone system where callers, if unable to get through to their local bureau, are routed to the next available bureau within the network, which for the Somerset Adviceline will be the other Somerset CABx.

	2015/16			2016/17		
	Q1	Q2	Q3	Q1	Q2	Q3
Overall Totals						
Number of clients helped funded by Core Funds	1042	159	1227	1289	1346	1224
Number of new enquiries	263	368	444	466	497	380
Number of activities	3337	4280	5377	5378	5779	4911
Number of issues	1897	4934	3312	3355	3308	2462
No of Issues by advice area						
Benefits	625	777	1099	1326	1244	1049
Consumer	77	115	122	115	99	91
Debt	437	729	778	617	686	437
Discrimination	2	10	27	19	18	12
Education	7	12	7	10	19	10
Employment	175	296	306	304	302	192
Financial services and capability	54	100	134	130	143	94
Health and community care	16	19	49	45	47	24
Housing	172	247	259	299	236	187
Immigration and asylum	20	14	11	16	24	6
Legal	98	90	120	111	123	84
Other	-	12	32	33	21	14
Relationships and family	17	203	265	231	251	181
Tax	146	20	28	28	39	37
Travel and transport	29	14	22	37	17	14
Utilities and communications	8	48	53	34	39	30

Number of clients assisted by outreach by District area						
Crewkerne	21	14	16	14	16	16
Chard	38	25	37	57	75	60
Wincanton	20	10	30	60	46	47
Ilminster	19	14	18	19	14	12
Martock Job Club	-	-	-	12	12	11
Somerton	-	-	-	1	17	7
Ryalls Park Medical Centre	-	-	-	2	15	9
Gateways* by advice channel						
In person	383	377	391	446	470	406
Telephone	412	475	416	364	352	364
Letter/fax	4	2	4		4	2
Email	80	78	66	57	52	48
Clients by District area						
Area North	98	83	101	108	143	133
Area East	101	102	108	156	162	116
Area South	350	451	436	473	478	421
Area West	185	184	200	129	236	213
Home Visits by district area						
Area North	17	28	7	11	6	6
Area East	28	8	9	13	4	5
Area South	33	37	32	26	18	15
Area West	31	28	16	9	3	8

Resources						
Core Staff fte's	6.6	6.6	6.6	6.6	6	6
Volunteers	36	41	45	42	45	49
Increasing the percentage of phone calls answered (less abandoned calls)	Baseline	Target	Progress	Baseline	Target	Progress
	32%	70%	27%	32%	60%	34%
Increasing the number of active volunteers	Baseline	Target	Progress	Baseline	Target	Progress
	22	60	40	40	60	47

- Gateway is the system of triaging clients

Funding Beyond 2017/18

The Council's relationship with its core funded voluntary sector partners (CASS and SPARK) is likely to change in the context of SSDC's Business Transformation programme and the ongoing requirement to achieve budget savings. It is proposed therefore that 2017/18 will be a transitional year during which a review into how SSDC will continue to support and work with CASS will be carried out. A report detailing the outcomes of the review along with recommendations will be brought back to members in a report to DX in the autumn 2017.

Financial Implications

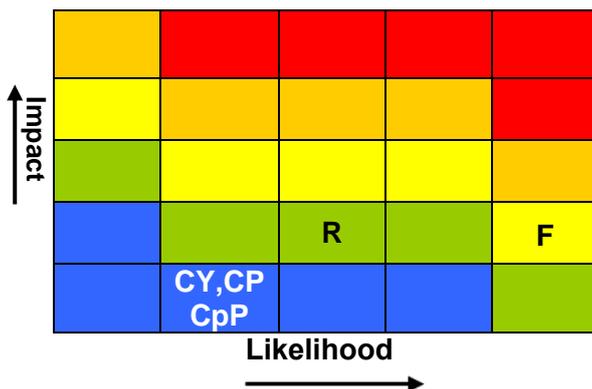
CASS has set a balanced budget for the 2017/18 financial year.

At the 13 October 2016 meeting with Cllr Ric Pallister and Cllr Sylvia Seal, it was advised that funding for 2017/18 would be at the same level as 2016/17, subject to District Executive approval.

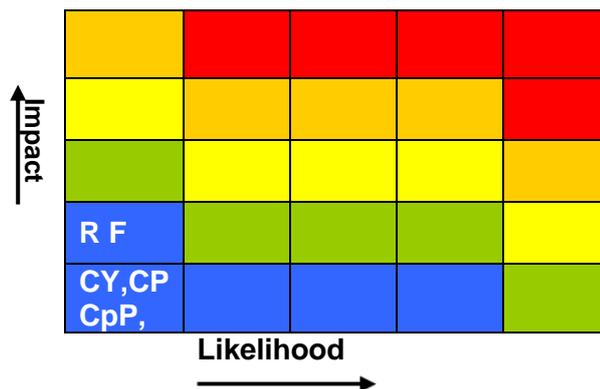
If the recommended budget allocation of £121,730 is agreed, all funds in the CASS budget will be committed for 2017/18.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

Funding CASS assists the Council deliver on the following values and priorities in the 2016-21 Council Plan:

Values

- Supporting people and communities, enabling them to help themselves
- Work with partners to achieve economies, resilience and influence

Priorities

- Target support to areas of need
- Actively manage assets and resources to ensure the best financial or community return
- Enable people to live independently for as long as they are able

Carbon Emissions And Climate Change Implications

CASS aim to deliver their services at a place convenient to the client. Financial management advice can include energy efficiency measures.

Equality And Diversity Implications

Working with the voluntary sector is one of the Council's means of providing services to hard to reach groups and engaging with communities and individuals who otherwise find it hard to access public services. CASS delivers services to some of the most vulnerable people in the district. Services are free and are provided to all regardless of age, race, gender, sexual orientation, religion. CASS has an adopted Equalities Policy.

Privacy Impact Assessment

None

Background Papers

- CASS report to DX December 2016
 - CASS presentation to Area North Committee 23 November 2016
 - CASS presentation to Area South Committee 30 November 2016
 - CASS presentation to Area East Committee 11 January 2017
 - CASS presentation to Area West Committee 15 February 2017
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