

Appendix A – South Hams Citizens Advice Bureau (SHCAB)

Introduction

This document provides details of a three year rolling Service Level Agreement (SLA) which will deliver and develop advice services in the South Hams.

This SLA will provide SHCAB with the security it requires to confidently plan service improvements for the future, whilst also providing South Hams District Council (SHDC) with flexible contracting arrangements which enable SHCAB to respond to changing economic and community needs.

Vision Statement

Information and advice services across the South Hams should be underpinned by the following principles:

Clients:

- Engaging with service users to influence decisions about service developments;
- Using a range of tools which empower clients to obtain the level of service appropriate to their needs and abilities;
- Access which is appropriate to the clients needs, using a range of channels, e.g. telephone, email, home visit, outreach, face-to-face;
- A service that is holistic and that addresses and prioritises the needs of those in greatest need and those living in poverty.

Social Policy:

- Providing feedback on client concerns to local and national policy makers;
- Having tools available to contribute to policy and service developments through effective and appropriate reporting and monitoring systems.

Services:

- Free at the point of delivery, confidential, impartial and independent of public services;
- Providing services meeting the Citizens Advice, or other, high quality standards;
- Making full use of new and emerging technologies to provide a joined-up service;
- Using volunteers from the local community to provide local services;
- Services that are efficient and cost effective, e.g. sharing back office functions, training, HR, accountancy or IT services;
- A service that has face-to-face access at its core;
- A service that provides both generalist and specialist support for clients.

Working in Partnership:

- Working with partners to develop a range of co-ordinated and integrated services to best meet the needs of clients;
- Making full use of the strengths of the best advice agencies across the South Hams and using best practice and collaboration to strengthen the quality of the services on offer;
- Responsive to new opportunities;
- Seeks opportunities to develop new core funding streams, e.g. health service, public and private sectors, which contribute to advice needs.

Service Design Principles

These guiding principles have been produced for the whole CAB service. This SLA funding provides the service with a strong “core” which then enables CAB to lever in wider funding, which in turn enables delivery against these principles.

First Principle – Targeting Resources at those in Greatest Need:

The first principle of CAB’s approach to service delivery is that it will maximise the number of clients who are able to resolve their problems for themselves, using a range of self-help techniques, including web-based resources, leaflets, recorded information and other emerging solutions. This approach is central to the Gateway model which enables CAB to target resources at those in greatest need.

Second Principle – Gateway:

The second principle must be that all new clients accessing the generalist advice service will receive a Gateway assessment of their needs to a common standard across the South Hams. This addresses the ‘greatest need’ principle as this assessment of need is built into the Gateway approach.

Third Principle – Telephone Services:

Given that some of the South Hams population are unable to travel to their Bureau, either for reasons of rural isolation or disability, the third principle is that CAB will try and guide the majority of clients to accessing services through telephone or email Adviceline services where it is the most appropriate route for them.

Fourth Principle – Face-to-Face Services:

Where a client needs to access services face-to-face, because of language or other communication needs, then they should be able to receive a Gateway assessment of their needs from a CAB outlet within an acceptable travelling distance of approximately 10 miles, or via a home visit, the fourth principle. It may also mean that CAB looks to develop partnerships with other local providers, perhaps through the Devon Advice Network (DAN), to provide a ‘gateway’ to CAB services, such as a ‘paid for’ telephone kiosk or IT kiosk service. CAB is also mindful of the needs of ‘communities of interest’ as well as geographical communities, such as gypsies and travellers, migrant workers, etc.

Fifth Principle – Funding of Generalist Advice:

The fifth principle is around the provision of generalist advice. This SLA states that CAB is ‘contracted’ for generalist, rather than specialist, services. Specialist or contracted services are expensive and require a different set of standards. Therefore, they do not form part of this SLA. By part-funding a generalist service, SHDC will then benefit from CAB being able to attract specialist projects and contracts. In order to make services accessible, wherever possible, generalist advice interviews should be by telephone where this best meets the needs of the client.

Sixth Principle – Specialist Services:

The sixth principle is that CAB will identify whether the client needs a specialist service or an alternative, such as mediation, (part of the Gateway approach). Where this is the case CAB will first put clients in touch with the CAB Devon specialists (possibly based in another Bureau or in the Devon Welfare Rights Unit) or where there is no CAB Devon specialist, put them in touch with specialists from other suitable organisations.

Seventh Principle – Social Policy:

The seventh and final principle is around fulfilling the Social Policy remit of the CAB service by engaging positively with local authorities and other partners to develop and lead a South Hams approach to address social policy evidence and other strategies.

Service Specification

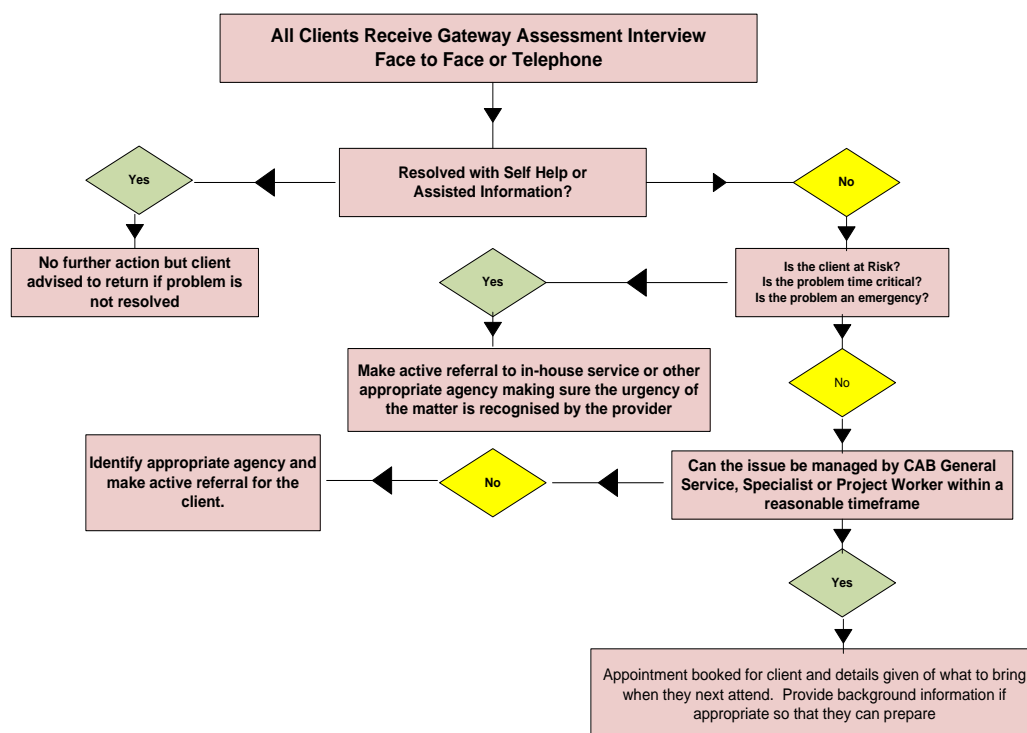
Provider
South Hams CAB Opening Hours: Monday – Thursday, 10:00-13:00 & 14:00-16:00
Grant Amount
£41,867 for 2013/14
Aims
The aims of CAB are: <i>To provide the advice people need for the problems they face;</i> <i>To improve the policies and practices that affect people’s lives.</i>
Principles
CAB provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

Service Description

There are three key strands to this specification, each of which contributes to a wide reaching service and supports the identified outcomes:

1. Generalist Advice
2. Volunteering Opportunities
3. Social Policy

In line with the second service design principle, all clients accessing the service with a new enquiry, by telephone or face-to-face, will have their advice needs assessed through a Gateway assessment. The assessment will determine the level of service which is most appropriate to their needs.



Gateway enables CAB to:

- Target resources at clients in greatest need;
- Maximise the number of clients helped by the service.

The Gateway approach acknowledges that clients have differing needs when they access the CAB service.

The Gateway approach also enables CAB to signpost the client to more appropriate agencies or areas of support. This may be to other advice services under the DAN umbrella, complementary services, or specialist advice either within the Bureau or provided by external organisations.

1. Generalist Advice

In line with the fifth service design principle, generalist advice funded by this SLA will meet the Community Legal Service Quality Mark at the following levels:

1. Information;
2. Assisted Information;
3. Generalist Advice.

Information services are a range of resources for people who can resolve their own problems themselves provided they have access to quality-assured information and self-help resources. The resources may include leaflets, factsheets, web-based resources or recorded information resources.

Assisted Information is a service in which Bureau workers are available to help clients to access information, and to identify where a client needs further information or advice. Where necessary for a particular client, the core service provided by the Bureau will also include contacting a third party to negotiate on the client's behalf including assistance up to, but not necessarily including, representation at tribunal.

Generalist Advice may also include taking action on behalf of the client to move the problem on through contact with third parties. The Generalist Advice service will also include the initial diagnosis of any legal issues requiring specialist legal advice and / or representation and the effective referral to specialist legal advisers both within CAB Devon and its partners or to other specialist advisers not funded under this SLA.

Delivery of Generalist Advice:

In line with the third service design principle, CAB promotion materials will guide the majority of clients to accessing services principally through telephone or email Gateway services Adviceline.

Quality of Generalist Advice Services:

CAB is committed to providing high quality advice services. This is underpinned by:

1. All Bureau hold and maintain the General Help or General Help with Casework and in some cases the Legal Services Specialist Quality Mark;
2. A Citizens Advice audit every three years through a long-standing accreditation agreement with the Legal Services Commission, which measures compliance with the Generalist Help Quality Mark alongside the membership standard and quality of advice assessment. Citizens Advice auditors are accredited to award the Community Legal Services Quality Mark at the General Help and General Help with Casework level.

Intended Service Users:

The service is available to all of the diverse communities in the South Hams, but with particular focus on those who are socially excluded and vulnerable and who need to understand their rights and who need both the protection of the law and help to move forward.

CAB will ensure that core face-to-face and telephone advice is concentrated on those defined as in 'greatest need' of advice, i.e. as people who face the most serious and urgent threats to their rights, and/or face the greatest barriers to resolving their problems themselves.

In planning the development of services CAB will aim to:

1. Deliver more consistent and better targeted services to those in greatest need;
2. Engage those in greatest need more effectively in the service;
3. Raise the profile of the service so that it is credible, competent, confident and authoritative for those in greatest need.

To aid with planning, and building on the concept of 'greatest need', CAB has adopted the following criteria to assist in judging who is in greatest need:

- Those who find it most difficult to assert their rights or access services;
- Those who have complex/multiple needs;
- Those in crisis or in need of urgent help;
- Those whose physical safety is threatened including through gender violence and hate crime;
- Those who are 'outside of the system' and are in need of support or representation.

CAB will strive to understand the challenges, issues, and geography of all members of the communities of the South Hams.

Access to the Service:

The service will commit to improving access for disabled people and those with mobility problems. Service delivery methods will be reviewed annually with SHDC. Opening times and locations will be clear to users so that they fully understand where and when they can access the service. This will be achieved by:

1. A single number telephone Adviceline 08444 111 444 with recorded, category specific information available outside of opening hours;
2. A web portal for CAB Devon www.cabdevon.org.uk;
3. Promotion via DAN www.askdan.me;
4. Promotional materials distributed throughout the South Hams.

Outcome	CAB Measure	SH Output	Reporting
Organisations and individuals with good access to advice and	Generalist advice service client contacts and enquiry	5,784 client contacts 7,207 enquiry issues	No. of client contacts No. of enquiry issues by

information	issues		category of law Client profile
Increased social value from local delivery of services	Financial gains for clients Total debts	90% satisfaction level with service £1,044,311 gains £3,550,657 debts	Client satisfaction No. accessing information and web-based services
Healthy citizens	Health and wellbeing outcomes questionnaire	25% of people reporting a positive impact on their health and wellbeing	Outcome of health and wellbeing questionnaire reported to strategic partners e.g. new health consortium

2. Volunteering Opportunities

This SLA will enable CAB to:

- Develop a profile of volunteers in the advice sector and target groups in the community who are under represented;
- Estimate the economic value of advice volunteers in the South Hams;
- Track advice sector volunteering as an employment and further education pathway.

The majority of generalist services are delivered by volunteers who:

- Deliver Gateway assessments on the telephone and face-to-face;
- Deliver generalist advice to clients on the telephone or by face-to-face appointments;
- Deliver reception and administration services;
- Help run the organisation as members of CAB's trustee board;
- Play a key role in helping to develop social policy.

Volunteers also play an increasingly large role in the delivery of financial capability preventative services.

Volunteering with CAB encourages, supports and enables people to become active citizens. Many of CAB's volunteers are former clients and this enables CAB to attract large numbers of local volunteers. This is central to CAB's success when working in communities because:

- CAB is trusted by some of the most vulnerable people in communities;
- CAB works in and has developed detailed local knowledge, backed up by the support of a powerful national network;
- CAB can help develop new skills, confidence and employability of local people;
- CAB has nationally recognised training programmes.

CAB volunteers are recruited in the local community; they understand their local communities and they ensure that the CAB network remains firmly rooted in their communities.

Outcome	CAB Measure	SH Output	Reporting
A robust and effective third sector promoting the principle and practice of voluntary and community activity in order to facilitate the development of diverse, strong communities and to enhance quality of life	New volunteers joining the service	11 new volunteers joined the service	No. of new volunteers: Their role No. completing training No. remaining in volunteering/education/training No. moving into employment
People feeling encouraged to take an active part in community life and become more active citizens	Annual Survey of volunteers	80% of volunteers feel that volunteering has enhanced their lives	Volunteering survey

3. Social Policy

Clients with a problem provide first hand examples of policies and practices having gone wrong. The case notes recorded during interviews with clients form the foundation of CAB's evidence based policy work.

CAB uses these case notes, anonymously, to demonstrate to policy makers and service providers the impact of their decisions, and to lobby for improvement. CAB's case notes are detailed and geographic coverage is incomparable, giving a vast body of evidence on the problems that people are facing. Bespoke software allows for it to be analysed at a local or a national level, and enables CAB to track trends year on year.

This unique and important insight empowers CAB to expose inadequate or unfair laws, policies and practices; respond with authority to Government consultations and recommend how resources can be targeted most effectively.

Knowledge about the problems people face mean that CAB can identify recurring issues and draw on evidence to bring about change to policies and practices at a local level, but also to feed into regional and national levels. It means the service can quickly respond, whether that is opening innovative additional advice outlets or contributing to local policy.

CAB identifies key social policy concerns in the areas of social security benefits, tax credits and social care and campaigns and advises policy makers and service providers in these areas.

Outcome	CAB Measure	SH Output	Reporting
Communities that have developed innovative approaches to problems and provide local services and improve the quality of life	Social policy evidence, reports and statistics	52 Bureau Evidence Forms (BEFs) highlighting issues from actual client cases Information provided to CAB Devon towards: 4 national evidence reports 1 Devon wide social policy campaign 4 Devon Social Policy Group meetings	No. of BEFs issues with breakdown of issue Report on social policy activities Details of campaign and outcome No. of meetings and outline of work undertaken

Added Value

Whilst the contribution of SHDC does not cover the entire core costs of running CAB, it is significant. It provides a stable footing on which CAB can bid for, and very often secure, significant external project funding for services for the people of the South Hams.

Outcome	CAB Measure	Reporting
Best Value	Total additional funding gained as a result of having a stable core service	Total income and brief report on individual project outcomes

Partnership Working

The service will work closely with other advice providers signed up to DAN and who can demonstrate quality of service, to ensure that service users receive the full range of advice they need in as seamless a way as possible.

Outcome	CAB Measure	Reporting
Third sector infrastructure and advice services that are provided in the most efficient way, using collaborative approaches where appropriate	DAN referrals	No. of referrals Types of referral No. by referral agency

Double Funding / Joint Funding

It is permissible and indeed desirable for CAB to seek additional funding for the General Help Service.

Funds provided by SHDC shall be construed as making a significant contribution to those core services referred to in this SLA, and for this purpose is deemed to form part of CAB's 'core funding'.

If work is reported against two funding streams then that must be fully explained to SHDC to ensure that value for money is being achieved.

This provision is particularly pertinent to Legal Aid Controlled Work which is generally fully funded through the Legal Aid scheme and should thus not generally be reported as having been funded through this SLA, unless this SLA funded specific and identified work not funded through the Legal Aid scheme (e.g. advocacy at court or tribunal representation).