

## Grant Working Party 7 December 2010

### Applications for Core Funding Grants: 2011/2012 Citizens' Advice Bureaux in St Edmundsbury

#### 1. Introduction

- 1.1 There are two Citizens' Advice Bureaux (CABx) within St Edmundsbury, one in Bury St Edmunds and the other in Haverhill. They are currently individual charities each run by a Board of Trustees.
- 1.2 The Council part funds each of the CABx in St Edmundsbury with annual core funding grants. The Council has nominated representatives on each Management Committee; in Bury St Edmunds, the Members are Councillors Oliver and Spicer; in Haverhill, Councillors Ager and McManus.
- 1.3 The objective of the Citizens' Advice Service is to provide free, confidential, impartial and independent advice to enable local residents to deal with a wide range of issues, including benefits, housing, money advice, employment, consumer, relationships, taxation and many more. The nature of the assistance provided will largely depend on the client's needs.
- 1.4 In 2010/2011, Bury St Edmunds and District CAB received a grant of £95,500 and Haverhill and District CAB received £106,500.

#### 2. The Citizens Advice Bureaux service in St Edmundsbury

- 2.1 The Council receives copies of the Bureaux Annual Reports and Accounts and these outline the number of clients who use the services, what the main issues have been and the organisations financial situation.
- 2.2 During 2010, the Trustees of both CABx have worked with other local Citizens' Advice Bureau to form the West Suffolk Citizens' Advice Bureau (WSCAB) which sits above the individual CABx in Bury St Edmunds, Haverhill, Brandon and Mildenhall, Sudbury and Newmarket. It is anticipated that some savings will result from this federation in areas such as training and the development of resources.

#### 3. The future of the CABx in Suffolk

- 3.1 In addition to the WSCAB federation, Bury St Edmunds CAB and Haverhill CABx, which are two separate legal entities, plan to come together with the Mildenhall and Brandon CAB. The target date for this full merger is the end of March 2011.

- 3.2 The Bureaux have recognised that they must move forward in a more integrated manner to make financial economies and provide a more comprehensive and structured service. The CABx have taken the opportunity of staff changes in the Mildenhall and Brandon and Haverhill bureaux to work towards a full merger which should result in additional savings in terms the number of managers employed and the best use of specialist advisers.
- 3.3 The current planning is for a shadow trustee board to be appointed in order to take the necessary decisions over the first quarter of next year in preparation for the merger to take place at the end of March 2011. Extraordinary General Meetings of each Bureau are to be arranged during December and January to confirm the final decision.
- 3.4 It is understood that other Bureaux in Suffolk are planning to merge or work jointly within the next year.
- 3.5 Attached as Appendix A to the report is a letter from the CABx outlining the preparations for the proposed merger.

#### **4. Funding issues**

- 4.1 The CABx rely on grants, public donations and fund raising events to maintain their services. The grants, in the main come from Suffolk County Council (SCC), the Borough Council and neighbouring Councils whose residents also use the service. The Borough Council grants are considered annually by the Grant Working Party (formerly known as Grant Panel) with recommendations forwarded to the Cabinet as part of the Council's budget setting process. A Service Level Agreement (SLA) is in place with both CABx which sets out the obligations of the CABx, the County Council and the Borough Council.

#### **5. St Edmundsbury Borough Council: Applications Received**

- 5.1 Individual applications have been received from Bury St Edmunds CAB and Haverhill CAB for £95,500 and £110,800 respectively. This represents a £4,000 increase in the application from Haverhill while the Bury St Edmunds application is held at the 2010/2011 level. However, in light of the outcome of the Comprehensive Spending Review, it is clear that the Council has to make savings across all areas of expenditure and Report B313 to the Policy Development Committee on 24 November 2010 outlined reductions in the level of grant funding. With this in view, an across the board reduction of 10% in those core funding grants which are up for consideration for the 2011/2012 budget is considered appropriate.
- 5.2 Although two separate applications have been received provided the anticipated merger of the two Bureaux takes place on 1 April 2011, it is proposed that the grant be paid as one amount. A Grant Scoring Matrix in respect of the combined applications is attached as Appendix B to the report. It would then be for the Trustees and Management Committee to allocate funds appropriately. Clear procedures are to be stated in the new SLA to ensure that the Borough Council funding is used to provide services within St Edmundsbury only and not within the Mildenhall and Brandon Bureau branches of the merged Bureaux which Forest Heath District Council funds.

- 5.3 Expenditure for both Bureaux have been estimated and will be revised based on the new structure if ratified by the new Trustees in due course, however it is not anticipated that a substantial saving in out-goings will be made in the short term. Whilst Suffolk County Council is yet to confirm its funding for 2011/2012, it is hoped that its overall support will continue at the same level as the current year.
- 5.4 Both Bureaux are working hard to improve efficiencies and raise profiles. At Haverhill, Gateway Assessment Interviews have been introduced to make the most efficient use of the time of the trained advisers. While the Bury St Edmunds Bureau has brought in over £50,000 of funding for specific projects. It is therefore expected that when the new combined Bureau is operational, it will continue to raise this level of additional funds.
- 5.5 The Borough Council works closely with both CABx in a number of areas, primarily Housing and Revenue and Benefits. This co-operation is very important and compliments both organisations. Staff from both sections are able to contact the Bury St Edmunds CAB and secure designated interview slots for their clients. Housing benefit staff accept CAB money assessments which saves them from having to complete such an assessment.
- 5.6 Both Bury St Edmunds and Haverhill CABx have seen significant increases in all types of referrals over the last year. With a new integrated computer system expected in the new year it should be possible to gain directly comparable information for both locations in future.
- 5.7 Statistics for 2010/2011 (to mid September 2010)

	<b>BSE CAB</b>	<b>Haverhill CAB</b>
Number of existing clients	673	566
Number of new clients	1,370	567
<b>Total</b>	<b>2,043</b>	<b>1,133</b>
Number of client contacts	6,739	4,348
Number of non client contacts	2,888	4,064
<b>Total</b>	<b>9,627</b>	<b>8,412</b>

- 5.8 Borough Council grants awarded to Bury St Edmunds and Haverhill Citizens Advice Bureaux in the last five financial years are as follows:-

	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011
<b>Bury St Edmunds CAB</b>	94,690	91,000	90,000	95,500	95,500
<b>Haverhill CAB</b>	108,700	101,000	100,000	106,500	106,500
<b>TOTALS</b>	203,390	192,000	190,000	202,000	202,000

- 5.9 In addition to these funds the Council supports the Citizens' Advice Bureaux in a number of non monetary ways with advice. Recently the Council advised of funding sources when they were looking to upgrade their computer systems to make all local offices compatible. Council officers have also acted as referees on external applications for funding.

## 6. Recommendations

6.1 It is **RECOMMENDED** that:-

- (1) subject to the budget setting process and assuming that the anticipated merger of the two Bureaux takes place with effect from 1 April 2011, a combined core funding grant of £181,800, as outlined in Section 5.2 of Report B365, be awarded to the newly formed joint bureaux for the provision of advice services within St Edmundsbury; and
- (2)
  - (a) in the event that the Trustees are unable to effect the merger by 1 April 2011, individual grants of £85,950 be awarded to Bury St Edmunds Citizens' Advice Bureau (CAB) and £95,850 to Haverhill CAB;
  - (b) half of each of this amount be released to the individual Bureau in April 2011; and
  - (c) delegated authority be given to the Corporate Director for Community in consultation with the Portfolio Holder for Bury St Edmunds and Community Safety to carry out an assessment by October 2011 to determine how the remainder of the grant will be released.

For further information, please contact

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**Bury St Edmunds and District  
Citizens Advice Bureau**

the charity for  
your community



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2.11.2010*

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[www.burystedmundscab.org.uk](http://www.burystedmundscab.org.uk)

1<sup>st</sup> November 2010

Dear Cathy

We are enclosing grant applications from both Bury St Edmunds and Haverhill Citizens Advice Bureaux together this year as requested. The bureaux obviously need to submit individual applications since we are still two separate legal entities, however as you know, our plans to merge including Brandon and Mildenhall CAB, are progressing.

Our current planning is for a shadow trustee board to be appointed over the next two months, in order to take the necessary decisions over the first quarter of next year in preparation for the merger to take place at the end of March 2011. Extraordinary General Meetings of each bureau members are being arranged over December and January, to confirm the final decision.

Regarding the financial information given in the applications, it is hoped that the income will remain fairly accurate, with the proviso that Suffolk County Council have not yet confirmed the amount of their total grant allocation to the Suffolk bureaux for next year.

The expenditure will be revised based on the new structure, and that work is proceeding at the moment but final figures have not yet been produced since the suggested structure is still subject to ratification by the individual trustee boards. As we discussed, we are unlikely to be able to show cost savings in the short term, but the restructuring should enable us to develop the service more effectively. We are all aware that we are facing challenging times in terms of our ability to meet the expected increase in demand for advice, and we are doing all we can to ensure that we will be able to continue to provide the support needed by our local communities. We are also aware that this is unlikely to be a short term issue, as the effects of the planned cuts across all levels of government are implemented, and will have an impact over several years to come.

As you can see from the information provided, the level of demand increased for both bureaux over the last year, and it would have been difficult for us to manage this without the additional funding provided by both Suffolk County Council and St Edmundsbury.

Community  
Legal Service

Charity registration number 1006099  
Company Limited by guarantee  
Registered number 2610702 England

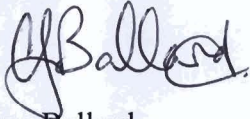
Registered office as above



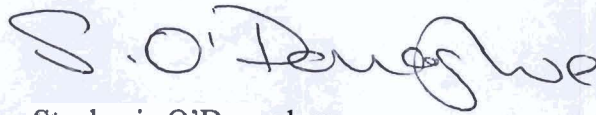
The continued generous support by St Edmundsbury Borough Council over the years has been fully recognised by both bureaux, and we appreciate the value that you have placed on our work for the community in contributing to the aims of the Council.

With best wishes

Yours sincerely



Jane Ballard  
Bureau Manager  
Bury St Edmunds CAB



Stephanie O'Donoghue  
Acting Bureau Manager  
Haverhill CAB

**Core Grants Scoring Matrix****Bury St Edmunds & District Citizens Advice Bureau and  
Haverhill & District Citizens Advice Bureau****Date**                      **December 2010**

<b>Criteria</b>	<b>This application</b>	<b>Score</b>
Grant Scheme	Core Funding 2010 - 2011	N/A
Summary of Organisation Services	Advice Services	N/A
Amount requested	Combined applications £206,300 (Bury St Edmunds £95,500 Haverhill £110,800)	N/A
Projected Annual Costs	Estimated combined expenditure £440,367 (Bury St Edmunds £250,067 Haverhill £190,300)	N/A
External Funding Sources	1 pt. = Up to 50% external funding 3 pts. = 50 to 75% external funding 5 pts = Over 75% external funding	3
Council's core Objectives	Section numbers that apply from Corporate Plan. 1 pt = Up to 5 and 3 pts = 6 to 11.	3
Risk to the Council	Low (1 pt.), Medium (3 pts.) or High (5pts.) Example of low priority is something that does not cause a loss of service by the Council.	3
Risk to the Bidder	Low (1 pt.), Medium (2 pts.) or High (3 pts.) An example of a high priority is the loss of a service which is important/vital to the community.	3
Community Impact	Low (1 pt.), Medium (3 pts.) or High (5 pts.) High priority will generate increased usage, increased social inclusion and benefit others.	5
Number of Beneficiaries	The number of people benefiting from the service whilst taking into account the importance of the organisation to the community.	3
Additional Information		N/A

**Total Score ..... 20** (Maximum score 24)