

## Community Chest Proforma 2015/2016

<b>Organisation</b>	<a href="#">Suffolk West Citizens Advice Bureau</a>	Application ID	<a href="#">SEBC4</a>
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<b>Contact</b>	Miss Janine Pinel
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<b>Value</b>	£24,326
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<b>Local Authority</b>	St Edmundsbury Borough Council
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### **Key points**

This project seeks funding to deliver an access strategy for SWCAB. Initially the project will increase resources to develop capacity and the skills volunteers need in order to increase the amount of advice provided via telephone and online services.

SWCAB will do some initial marketing of the telephone advice service in the autumn and through sharing the new phone number with partners. This will facilitate the overall aim which is to restructure in order to provide more services via telephone. SWCAB will install a new telephone system at Haverhill to link up with Bury St Edmunds, and Brandon to provide one telephone advice line across Suffolk West, answered consistently Monday to Friday. In addition to this, the project aims to provide the public with access to PC's with the objective of empowering people to help themselves. Once the process is set up for e-enquiries no further investment will be required, although SWCAB envisage the need for 'information assistant' volunteers, i.e. volunteers to support clients to access on-line services and develop their on-line skills with 1-1 mentoring to be recruited.

### **Clarification Questions:**

***Does the access strategy reflect an opportunity for efficiencies and savings or will it be it to keep up with an increased demand for services?***

The answer to the first question is both!

With reduced core funding, but an awareness that we need to reach more people, the changes we are making will allow us to deliver more flexibly and utilise our resources across the whole area.

It is very resource intensive to be continually dealing with problems when they have already become emergencies, and our strategy is aiming to make it easier for people to contact us for help as soon as they are aware that they need it. This then becomes much more manageable for us, and dealing with more issues over the phone means that we do not have to consider extending opening hours to improve access (which has significant budget implications) because people can be dealt with by whichever bureau is open at the time they need us. If they then need an appointment this can be offered at whichever bureau site they can get to or they can have a diaried call back at a time that suits them. So in terms of efficiencies, this is a much more flexible delivery method.

However, we are aware that there is a high element of unmet need, and I would hope that increasing access by telephone, and also outreach (such as our GP surgeries project) is likely to address the needs of more clients, and this increase will have an impact on our service. Delivering the majority of the additional advice by telephone means that we can deal with proportionately more clients than through face to face advice, so it enables us to better manage the increase.

***Have you considered an application to One Haverhill for the new telephone equipment in Haverhill?***

The answer to the second question is that we have applied to ONE Haverhill unsuccessfully a couple of times, I think last year it was for financial capability work with young people, since we were working with the Cangle and wanted to work with the schools.

**St Edmundsbury Borough Council  
Community Chest Grant Application Form  
Part A**



Community Chest funding supports voluntary and community groups who make a contribution to improving the quality of life for people in West Suffolk. The information you provide will help us consider your application. If you have any questions, please give us a call on 01638 719763. Before completing this form, we ask you to please read the guidelines, which are available on: <http://www.westsuffolk.gov.uk/community/community-grants.cfm>

Please return your completed, signed form and supplementary documents to: [richard.baldwin@westsuffolk.gov.uk](mailto:richard.baldwin@westsuffolk.gov.uk)

1. Name of your organisation(s): 

<b>Suffolk West Citizens Advice Bureau</b>
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2. Organisation address details

Address Ln1	The Risbygate Centre		
Address Ln2	90 Risbygate Street		
Address Ln3			
City/Town	Bury St Edmunds	Postcode	IP33 3AA
Main phone	01284 753675	E-mail	
Website	<a href="http://www.suffolkwestcab.org.uk">www.suffolkwestcab.org.uk</a>		

Main Contact Person		Second Contact Person	
Title	Miss	Title	Mrs
Forename	Janine	Forename	Jane
Surname	Pinel	Surname	Ballard
Role	Operations Development Manager	Role	District Manager
Daytime Tel No.	01284 767572	Daytime Tel No.	01284 767572
Mobile No.		Mobile No.	
Email	<a href="mailto:Janine.pinel@swcab.org.uk">Janine.pinel@swcab.org.uk</a>	Email	<a href="mailto:Jane.ballard@swcab.org.uk">Jane.ballard@swcab.org.uk</a>
Address Details (if different from Org address)		Address Details (if different from Org address)	
Ln1		Ln1	
Ln2		Ln2	
Town		Town	
Post Code		Post Code	

## About your organisation

3. What local authority area(s) does your organisation work in?

St Edmundsbury and Forest Heath

\*Community Chest funding is offered by both Forest Heath and St Edmundsbury councils. As the decision making process is different any projects applying for funding across West Suffolk, must apply separately.

4. What is the status of your organisation?

Registered charity	✓	Charity number:
Applying for charitable status		1144118
Company limited by guarantee	✓	Company number:
Community Interest Company		7645392
Part of a larger regional or national charity (Please state which one)		
Constituted Community Group		
Social Enterprise		
Other (Please specify)		

5. How many people are involved in your organisation?

Management committee	9	Service users	5582
Full Time staff / workers	1	Volunteers and helpers (non-management)	115
Part Time staff / workers	18		

6. What is the purpose of your organisation? Please briefly describe why your organisation was set up, its aims and objectives and who primarily benefits from your organisation.

The Citizens Advice Bureau (CAB) service offers free information and advice to all members of the local community. The aim is to provide the advice that clients need at the time they need it. The dual aim is to promote change locally and nationally through social policy work by utilising the vast network of bureaux across the country to lobby parliament/other organisations.

Advice is provided in a holistic fashion to each individual client to ensure that any underlying issues, that can adversely impact on their ability to move forward in their problem, are addressed.

Bureaux are independent charities but work within the criteria laid down in the Citizens Advice membership scheme - quality of advice audit standards, management and organisational standards.

Our strategic development is focused on reviewing our service delivery across Suffolk West, taking into account the changing needs of our clients, volunteers and core funders. In particular our priority is increasing access to advice across our rural area, including promotion of self-help on-line information and improved initial access to telephone advice through sharing services across our four sites in Bury St Edmunds, Haverhill, Brandon and Mildenhall.

We are working with key partners across West Suffolk to facilitate early intervention by increasing awareness of free information and advice services from the bureau and other local sources of support. A partnership approach enables us to strengthen our rural communities (at a time when we are witnessing cuts in partners' reach) by working towards a multi-disciplinary approach with both larger and much smaller community groups to encourage a self-supported framework across the area. In working with partners and trying to create links between our service and smaller niche organisations we have formed the conclusion we need to enhance our stance as the first port of call to be able to support front line workers in the community alongside directing them swiftly to local support organisations.

7. What was your organisation's total income for last financial year?
8. What was your organisation's total expenditure for last financial year?
9. Does your organisation have more than six months running costs? Yes / No
10. What are your organisation's current unrestricted reserves or savings?
11. West Suffolk prioritises building resilient families and communities that are healthy and active. Please indicate which of the following areas your project contributes towards:

✓	A thriving voluntary sector and active communities who take the initiative to help the most vulnerable.
	People playing a greater role in determining the future of their communities.
✓	Improved wellbeing, physical and mental health.
	Accessible countryside and green spaces.

## About your project – why are you applying for this funding?

12. What do you want the funding for? Please be specific. Please note that 'project' is meant to describe the project for which you are seeking funding, and not your organisation.

### **Enhanced access to advice services in West Suffolk**

Our project brings together our Access Strategy aims to improve access to free advice for local residents. Following our service delivery review we identified the need to improve our telephone advice service, as we cover a large rural area and due to the impact of poor community transport links, disability and household care responsibilities we identified that some residents are unable to access advice and lack the digital skills or the awareness to search online for solutions.

We have been making changes to face-to-face advice processes with the ultimate aim of liberating volunteer resources to prioritise telephone advice services across our rural area. Over the past 3 months we have piloted a new approach to triaging clients at each of our 4 sites to manage our resources and, where feasible, direct clients to self help services and to ensure that our volunteers' time is focused on always "moving the client forward" in their problem during their visit.

1) Telephone services: we have also ran a pilot study to prioritise telephone calls and discovered issues with managing the additional volume of case checking, alongside the requirement for quick feedback to advisers to improve their handling of enquiries and their case recording. Volunteers give their time once a week and therefore the feedback process needs to be on that same day, rather than a week later when the volunteer would have forgotten specifics of the case.

This pilot also highlighted the difficulties faced by volunteers when case recording on the national Citizens Advice database and so we put ourselves forward in late 2014 to work with Citizens Advice software developers to design some 'bolt on' software which is more systematic and logical to use and trained all the volunteers in April on using this new system to record their cases. Early analysis has demonstrated this has already begun to improve case recording.

We would now like to take the best practice from our face-to-face approach and develop this into our telephone advice service. In particular this requires managing expectations of volunteers who tend to automatically direct people to come into the bureau rather than dealing with their enquiry over the phone. Volunteers prefer face-to-face interviews as they feel under greater pressure to quickly resolve issues over the phone and feel more comfortable managing enquiries by being able to build a rapport with the client face-to-face.

We therefore need an interim period of increased capacity within our Supervisors' team to manage the increase in case checking whilst our volunteers are re-deployed to answering more calls. We must ensure that the quality of advice and the level of advice given (along with how it is recorded) is of a sufficiently high standard and for this we need to facilitate on-the-day feedback to volunteers to improve their skills and confidence.

From an operational viewpoint we would like to seamlessly manage one Suffolk West CAB telephone service with volunteers on rota at each site to share the answering of the phone on specific days each week. We received funding in 2014 from Suffolk Community Foundation to link up Brandon to Bury St Edmunds and have been deploying new trainee advisers to answer the phone on a Wednesday morning at Brandon with 1-1 coaching support from a supervisor since mid June. In 2014 we also piloted using a supervisor to provide 1-1 coaching to volunteers who lacked confidence with answering the phone and were really pleased with the impact (both in terms of volunteer skills but also the improved confidence in those trainees who are actively seeking employment). We would like to replace the telephone system at Haverhill so that the phone can be seamlessly shared across Bury St Edmunds, Haverhill and Brandon over 5 days per week.

From the client's perspective having one phone number to ring is the ideal, rather than different numbers on different days of the week which is too confusing, especially when we have to juggle and change answer phone messages to instruct clients to ring a different number. We would also work towards having clear signage at each site when closed to redirect residents to one phone number for advice.

Operationally we are reviewing national statistics on the peak times that clients are likely to phone for advice and ensure our service matches those. This will require some service reshaping during the autumn and motivational leadership to bring the volunteers on board to the change.

2) Self help: there is a wealth of information and clear fact sheets available via Citizens Advice. We wish to facilitate public access at all 4 sites for self help. Our aim is that where appropriate to a client's capability some drop-in clients can be directed to this trusted on-line information source so that they can either

- ✓ find the answers themselves, or
- ✓ be able to ask informed questions when they later see an adviser, and
- ✓ ultimately be able to refer to this source of help themselves (or for someone else in their community) in the future from home.

Our aim would be to provide support for this public access to clients who need it – either by trainee advisers or possibly work experience students / people on JSA with IT skills.

We have been offered some recycled PC's from West Suffolk as we need to upgrade the majority of our PC's to Windows 7 to meet the government's Cyber Essential requirements. We have also received some support from Bury St Edmunds Town Council towards the cost of the upgrades of the Bury St Edmunds machines. As a result we anticipate spare capacity to place public access PC's in Bury St Edmunds and Brandon, whilst we have shared access to PC's through West Suffolk council offices in Haverhill and Mildenhall.

3) Website development and e-enquiries – another part of our service delivery review highlighted the desire for e-enquiries. Having public access PC's available at times the bureau is closed (for example in council offices) will enable some clients to access advice services beyond self-help factsheets on Citizens Advice. There are two priorities to resolve before we embark on e-enquiries, firstly to answer the phone every day of the week consistently (as this targets support to

the most vulnerable and isolated) and secondly to wait for clarification from Citizens Advice and the ICO over data security expectations for e-enquiries. However we would like to move forward with OneSuffolk assisting to set up the framework for e-enquiries.

4) Building links to facilitate a multi-disciplinary approach – at the Newmarket Families & Communities summit the break-out groups discussed methods for linking up the resources in the area so that smaller niche organisations with specific skills could be reached by referrals from other groups and local residents. Likewise empowering groups to refer back to larger providers like CAB.

The Forest Heath funded Rural MoneySmart project was designed to promote community financial capability training. The huge benefit to having a dedicated member of staff networking in the local community has been to draw in the “links” to and between organisations and local residents. We would like, for the 6 months of this project period, to increase capacity within our St Edmundsbury financial capability team to mirror the networking approach to providing initial talks on the CAB service to engage with local groups and fundamentally raise awareness of CAB services to facilitate early intervention. This will empower those working in local communities or for individual rural-connectors (proactive people in rural communities) to signpost to the Citizens Advice website, our service and access to local support groups/services within either St Edmundsbury or Forest Heath.

13. How has the project been developed out of the community’s desire to improve the lives of local people? What evidence do you have that there is a need for this project? Please include sources of evidence, including any public/user/community consultation.

Through the Rural MoneySmart project we have been able to start mapping out community resources in Forest Heath. Networking takes time but the rewards have enabled us to understand the need for rural support systems, due to the added challenges faced by the rural community. Key issues, which would be replicated across St Edmundsbury include:

- ✓ Impact of welfare reform – including Universal Credit requiring improved budgeting skills
- ✓ Low paid seasonal / casual work
- ✓ Fuel poverty issues – including expensive oil tank refills
- ✓ Debt problems directly impacting on child poverty – from feeding families or putting the heating on; debt impact on child welfare and educating families on money management skills
- ✓ The impact of loneliness, particularly the elderly population, carers, disabled residents and those with MH problems
- ✓ The impact of isolation from basic services (rural transport issues/lack of social mobility/geographical isolation/distance to services/digital exclusion) and the need for rural regenerations (like ‘the pub’s the hub’)

In addition we have witnessed (and are monitoring) a reduction in some local services across West Suffolk, which directly affects the most vulnerable in society and need to share this information.



Overall we understand the need for the CAB to integrate more fully into the community to facilitate raising awareness of our service (and other services) to promote early intervention. This mirrors results from our core Service Delivery review to improve rural access to advice alongside the need to expand partnerships and referral processes to grow a cohesive multi agency approach – fully utilising expertise and resources already within the community.

Client feedback – our last client survey had 35% of respondents requesting first access by telephone. As we cover a rural area we must facilitate telephone advice services to be the first port of call and enable early intervention. Feedback from rural residents via the MoneySmart project has highlighted the inability to access our service by some residents.

Consultation leading to SWCAB Access Strategy:

We have consulted widely with a range of people to establish local needs. The consultation has taken a number of forms and been carried out at different times, although all of this is relatively recent (under 12 months):

- a) 50% experience rural deprivation issues - e.g. issues with access to basic services, this includes 63% who have poor/very poor access to public transport
- b) 63% need advice to overcome financial, social and other issues they are facing
- c) 50% surveyed from rural locations were disabled or had long term health problems
- d) 50% of those who need advice experience barriers to accessing this from our four CABs (lack of mobility, lack of access to public or private transport, childcare or clash with work hours)
- e) Of all those surveyed 68% would like to access advice by phone - rising to 75% for those in rural locations. Clients demonstrated their need for access to 24-hour advice through webpage (25%) or e-mail (37%).
- f) 71% of disadvantaged people consulted told us that they would prefer to access advice closer to home either on an outreach basis or through using another quicker, easier medium such as e-mail (75%), phone (75%), Skype (75%), self-service via a website (63%) or a touch-screen kiosk (75%)
- g) 51% of residents have access to the internet at home, 14% do so via the library or family/friends, and 18% have no access to the internet.
- h) 25% of clients who sought face-to-face advice live in a rural location. As 42% of West Suffolk's population live in rural areas this suggests we are not meeting the need of the rural residents. Partly this can be explained by the 'need' for rural residents to own a car to access services - of the clients polled 16% came in by car, 7% travelled by bus (taking an average of 20-30 minutes to reach the bureau). 43 % travelled between 2 and 10 miles for face-to-face advice, of which 58% travelled over 5 miles.
- i) Over 84% stated they had no where else to go for free advice for their problems

#### 14. How will the project help local people to support one another?

Early intervention in solving local residents problems is facilitated by:

- ✓ Direct access to advice, at the time they need it - providing access to high quality free advice by telephone Monday to Friday.
- ✓ Increased awareness to on-line advice for those who are able to access this, and for those within their social network they could then help with accessing on-line fact sheets and details of CAB services
- ✓ Signposting and referral to other agencies/support groups – by building and sharing our database of local services available within St Edmundsbury will enable both our advisers and those working out in the community to increase their awareness of support already available. E.g. an agency providing a home visit is met by the resident claiming to be lonely and isolated, they can look at our website and suggest local social groups/clubs in their area.
- ✓ Ensuring that local rural-connectors (people working in the community) are aware of advice services from the bureau and other providers, all from one source. People would not have to retain local information, they would have one place to look for information which is current and maintained.
- ✓ Improving the skills and confidence of volunteer advisers across Bury St Edmunds and Haverhill to answer queries over the phone to be able to move the client forward in their problem, either through directing them to on-line advice (or via e-mailing the link to them) or through reviewing their options over the phone (before the last step of booking an appointment at one of our 4 sites to have more in-depth advice)
- ✓ By mapping enquiries across St Edmundsbury and trends in advice needs, alongside being out in the community mapping services through networking we can share this intelligence with West Suffolk locality officers to identify areas of strength and weakness in the local community. This also enables us to look identify need and work with partners to access project funding to provide solutions e.g. assessing digital exclusion and the impact on households in rural areas where shopping on line to compare oil prices could save individual households hundreds of pounds to reduce fuel poverty.
- ✓ Through delivering more talks and financial capability sessions it is possible to identify within groups individuals with skills to help others in the group to tackle specific issues e.g. comparing grocery bills. In addition to promoting scams awareness.

✓ All whilst raising awareness of free information and advice services from Suffolk West CAB and volunteering opportunities to build capacity.

15. Are you working with any other organisations on this project? Yes

If yes, please state the names of these groups and the nature of the relationship.

Within the constraints of the short project duration we wish to work with as many agencies as possible within St Edmundsbury, in particular connecting with smaller groups and mapping out services in the area.

We will also be promoting the services of key partners, including:

Eastern Savings & Loans credit union – to promote ethical alternatives to lending than highly marketed pay-day lenders and door step lenders, and in some areas (including pockets in Haverhill) illegal money lending loan sharks.

Rural Coffee caravan – sharing information on specific rural areas in St Edmundsbury and planning opportunities for the spring/summer of 2016 for CAB to attend events and promote the work of the bureau

Suffolk County Council Trading Standards – continuing to promote scams awareness, particularly with those supporting the rural community as isolation has been shown to be a factor in the likelihood of residents being fooled by scammers.

16. When will the project start?

October 2015

17. When will the project finish?

March 2016

or is the project ongoing?

If this is an ongoing project, how will it be funded and continue going when the funding ends?

The aim is to increase resources in the longer term within Suffolk West CAB, however the initial project will increase resources to develop capacity and skills in our volunteer team:

- ✓ Short term increased Supervisor case checking and mentoring of volunteers, which should improve their skills, confidence and the standards expected from telephone advice. Once the new service delivery model is set up we expect to be able to reduce the level of case checks for advisers providing telephone advice
- ✓ We will do some initial marketing of the telephone advice service in the autumn and through sharing the new phone number with our partners we do not anticipate that further advertising would be required.
- ✓ Short term increase in Financial Capability Coordinator's hours across St Edmundsbury to facilitate greater networking and data gathering on existing support services (and any reduction in services) for mapping and sharing with partners. We may wish to continue the increase in hours for the Financial Capability Coordinator for the St Edmundsbury area and will monitor this during the project term.
- ✓ Ideally recruitment of additional volunteer advisers to answer the phone and deliver community financial capability training to enable best use of the Financial Capability Coordinators time.
- ✓ Install a new telephone system at Haverhill to link up with Bury St Edmunds, and Brandon to provide one telephone advice line across Suffolk West, answered consistently Monday to Friday. Once in place there should be no further capital investment required.
- ✓ Increased Supervisor time and Project Management time to mentor the volunteers towards championing the local rural need to answer the phone and the positive impact this can have on some of the most vulnerable in society.
- ✓ Once the process is set up for e-enquiries no further investment should be required.
- ✓ Once the public access PC's are in place no further investment should be required, although we may find the need for 'information assistant' volunteers, i.e. volunteers to support clients to access on-line services and develop their on-line skills with 1-1 mentoring

18. Which years funding are you applying for?

19. How many people do you expect to benefit directly from the project on either a weekly, monthly or annual basis?

20. What results (including targets/numbers) do you expect to see as a result of the funding and how do these relate to the Community Chest funding criteria?

1) Improved access to telephone advice through advertising one phone number - a 33% increase in answering telephone calls across Suffolk West. This outcome equally demonstrates the variety and complexity of issues raised by rural clients (measured using our client case recording system contacts and an analysis of problems raised by the phone to influence our advice needs analysis and service strategy). *Early*

*intervention in managing residents problems, being the first port of call to manage problems by improving residents ability to access advice irrespective of where they live in West Suffolk. Early intervention includes key advice areas: debt advice, benefits, relationship breakdown and employment.*

2) Increased quality of advice towards ideal of “moving client forward in their problem” on the telephone. Alongside improved case recording to speed up case checking process - through better quality of case recording using our new systematic 'bolt-on' software alongside the guidelines, up from an average of 6 per hour to 8 per hour (measured with analysis of staff hours and volumes checked alongside feedback tasks to volunteers for time period). This enables the bureau to continue to provide a value for money service where funds are used to maintain the number of staff hours required to run an effective, efficient core service. *Value for money, building capacity through volunteers managing enquiries over the phone. Feedback process to volunteers includes raising awareness internally of any options for signposting/referral to other agencies/groups operating in the area.*

3) Increased access, at bureau sites, to our webpage and the Citizens Advice public information service. Readiness for on-site e-enquiries during out of drop-in hours. *Improved awareness of trusted public information service and increased access to on-line advice services for self help and later e-enquiries. Improved awareness for all services operating in the area by having one place for local rural connectors and those working in the community with residents to resource additional support groups/clubs.*

4) Increased hours of financial capability coordinator to facilitate mapping of services in St Edmundsbury alongside increasing community money management skills. *Intelligence of local services/groups in St Edmundsbury – identifying service opportunities through partners and gaps in services and sharing this information. Improved awareness of CAB services across the area and finding new rural groups to deliver MoneySmart training to residents.*

21. What is the total cost of the project?

Please provide a full breakdown of the total cost of this project, including VAT if applicable along with any in-kind contributions such as volunteer hours.

<b>Item or activity</b>	<b>Cost (£)</b>
6-month project costs	
Staffing:	
Additional Supervisor Quality of Advice case checking hours 12 hpw	£4,463
Additional Financial Capability Coordinator hours 12 hpw	£4,324
Marketing & Evaluation assistant for St Edmundsbury 6 hpw	£1,793
Project Management 2 hpw	£1,917
Project running costs:	
Marketing and webpage	£1,750
Volunteer recruitment and training	£300
Community focus groups	£120
Community financial capability resources	£115
Travel expenses (paid staff/volunteers)	£1,300
Capital expenditure:	
Setting up public access PC's in reception	£450
New telephone system in Haverhill CAB	£6,282
Contribution towards full cost recovery:	£3,362
<b>Total cost of items listed above:</b>	<b>£26,176</b>

22. How much funding are you applying to us for?

23. What funds have you raised so far for this project?

Source	Amount (£)
Suffolk Community Foundation – Suffolk Fund July 2015 Bury St Edmunds Town Council – PC upgrades, 2 for public access West Suffolk recycled PC's (no cost assigned) June 2015	£1,950 £100
<b>Total fundraising:</b>	£2,194

24. What other funders have you applied to for further funding for the project?

Funder	Amount (£)	Timescale for decision
<b>Total:</b>		

25. What other grants and contracts has your organisation received over the past year from either Forest Heath District Council or St Edmundsbury Borough Council?

Funder	Amount (£)	Reason for funding
15-16 Rural MoneySmart project £30,000 (shared with Newmarket CAB)	£30,000	To promote community services across Forest Heath, linking in local residents and community groups to create a stronger and more resilient community. Deliver community money management skills training.



*St Edmundsbury*  
BOROUGH COUNCIL

St Edmundsbury BC annual grant	£181,800	} To provide free information and advice services to local residents in Bury St Edmunds, Haverhill, Brandon and Mildenhall. This includes some casework support in money advice, benefits, consumer and housing.
Forest Heath DC annual grant	£39,650	
<b>Total:</b>	<b>£250,650</b>	