

Appraisal application form for Interaction NMP Board

A Summary and basic information

1. Title of proposal	Tendring CAB continuation of funding 08/09		
2. Date submitted	25 July 2008		
3. Summary of proposal (max 150 words) i.e. what does the proposal involve and what will it achieve?			
Our proposal seeks to continue and consolidate our outreach advice service in Pier and Golf Green wards in 08/09. The service will be delivered by a part-time advice worker (2.5 days a week) based in Jaywick Enterprise Centre and Pier Childrens Centre with specialist support from staff in our main office in Carnarvon Rd, Pier Ward.			
3. How much will the proposal cost in total?			
	From NM	From other sources	Total
Capital			
Revenue	£16,610	£4,000	£20,610
Total	£16,610	£4,000	£20,610
4. Organisation responsible			
Name of contact and position	Rhonda Starling, Strategic Manager, Citizens Advice Bureau Tendring		
Address	18 Carnarvon Road, Clacton-on-seam, Essex. CO15 6QF		
Phone	01255 436464		
e mail	rhondas@tendringcab.cabnet.org.uk		

B The proposal

1. What is the problem you are trying to address? Set out the problems and causes, using statistics and evidence where available – referring to the delivery plan and its targets and outcomes.

The problems identified in these two neighbourhoods are:

- (i) The following issues previously identified have not changed although the percentages may differ slightly. Poor health & people caring for those with poor health – 24% of the population in Jaywick SOA have health that is 'not good' compared to a TDC average of 10.2%. There is also a disproportionately high number of unpaid carers working more than 50 hours per week (43% compared to a TDC average of 26%). In Clacton town centre SOA, over 73% of carers provide 1-21 hours unpaid (TDC average of 64%).
- (ii) Social exclusion – there are a higher than average number of people within both these SOAs who have no qualifications whatsoever (58% in Jaywick, 46% in Clacton town centre (TDC average of 38%), which anecdotally leads to a sense of exclusion. This is particularly so in Jaywick SOA because of the physical isolation from the town centre and the poor infrastructure. As a result, the quality of life has deteriorated which is exacerbated by the lack of opportunity locally in these two environments.
- (iii) Lack of awareness of housing rights for tenants – over 43% live in private rented accommodation in Pier ward compared to a Tendring average of 8.3%, and over 39% rent from private or social landlords in Jaywick and are in receipt of Housing Benefit. The total number rented without receiving this benefit is yet to be confirmed. It has become apparent that many of the properties in the Grasslands and Brooklands areas are of substandard living conditions and we are dedicated to inform tenants of the rights that they have.
- (iv) Access to services – because demand continually outstrips supply, many clients cannot access bureau services. Additionally, in the case of Jaywick clients are not accessing the service due to the physical isolation and social exclusion.

2. Proposal objectives? List the objectives for the proposal (these should be measurable)

The objectives of this proposal are:

- (i) To continue to ensure people from Jaywick SOA and Clacton town centre SOA have access to a quality marked dedicated advice services that can help them with information regarding benefits, maximisation of income, managing debt, housing advice, employment rights & financial consequences of returning to work.
- (ii) To continue to provide in-depth specialist advice to people regarding housing, debt, employment and welfare rights when required. This is provided by our own specialists or those we work in partnership within our offices.
- (iii) To empower people from these SOAs with the information they need, and to provide self-help sources of help via an information kiosk for those who cannot or will not seek face-to-face advice.

In terms of (i) and (ii) above, the measurable outcomes would be:

- Number of clients accessing the service. Between the 1st of April 2007 and the 31st March 2008, 854 enquiries were dealt with relating to Pier and Golf Green wards.¹
- Number and type of issues for which clients are seeking advice. Between 1st April 2007 and the 31st March 2008 Tendring Bureau dealt with the following types of enquiries relating to Pier/Golf Green wards: 20% debt enquiries, 4% finance enquiries², 28% benefits enquiries, 5% Relationship enquiries, 13% housing enquiries, 6% legal³ enquiries, 7% employment enquiries¹.
- Increases in income achieved through accessing advice (weekly and long term basis). For example, the number of children in families supported by out of work benefits is over 45% in these two Tendring wards compared to a national average of 21%. (Figures taken from the local authority publication Tendring Matters 2007 and T. Hirsch and D. Hirsch of the Joseph Rowntree Foundation).
- Levels of debt managed by coming to the service, and levels of debt written off as a result of accessing the service.

In terms of (iii) above, the measurable outcome would be:

- (i) statistics indicating the type of information sought by users which can help shape the services offered in that locality in the future

3. How do you propose to address the problem? List the activities and set out who will benefit.

To achieve this, the proposal is for the following:

- (i) Provision of dedicated part-time (2.5 days pw) adviser at Clacton CAB for these two SOAs, able to see clients on an appointment basis either at the bureau or other suitable outreach location when required.

Beneficiaries:

- (i) All residents of Jaywick and Clacton Town Centre with general problems, who do not currently access advice services due to lack of awareness of services available
- (ii) Residents of Jaywick who are housebound or less mobile and cannot access the town centre bureau
- (iii) Carers in both SOAs
- (iv) Low income families and individuals who would otherwise not access the service
- (v) People returning to work who want to understand the financial consequences of doing so
- (vi) Tenants of private or social landlords

¹ Figures from case reports 'enq part 1' downloaded from cablink on 9th July 2008 – more info available upon request.

² Definition of Finance enquiry – advice relating to banking, loans, insurance and credit reference agencies

³ Definition of legal enquiry – issues relating to courts of law, compensation, crime, wills and change of name.

- (vii) All residents from both SOAs who need assistance with negotiating settlements on their behalf
- (viii) All youth regarding education issues by referral to the Children's Legal service who we work in partnership with and work from the Pier Ward CAB.

Residents who, for whatever reason, do not seek face-to-face advice but are happy to locate information themselves via information kiosks

4. How does this proposal address the problem? List activities and describe evidence from similar initiatives if possible.

- (i) Access to services – Demand continually exceeds the ability of the town centre bureau to supply all client needs. Whilst other means are attempted to resolve this difficulty, a mixture of service delivery with kiosks and dedicated phone line to the bureau from Jaywick during certain hours has increased awareness and availability of the required information and/or provision of face-to-face advice. Over **850** enquiries have been dealt with as a face to face basis.
 - A report from the Dept of Constitutional Affairs has cited that vulnerable people need a greater level of help, good telephone or face-to-face advice that is independent).
- (ii) Provision of benefits advice – CAB Tendring are working in partnership with The Guinness Partnership Trust Foundation so as not to duplicate the service of giving benefit advice. All the cases identified that are not of an urgent nature that are suitable for a referral in order for the greater number of clients can be helped. Statistics prove that much care in these two SOAs is provided on an unsupported basis. A benefits check would be performed for all clients accessing the service in these two areas, to ensure that benefits take up is maximised.
 - A Liverpool University study in 2002 examined CAB services based in surgeries and hospitals and concluded that 60% of those interviewed obtained new benefits in the short term; 50% interviewed also said that this increased income would allow them to eat better, use more heating, ease payment of bills and relieve the effects on them mentally.
 - The dedicated adviser at CAB Tendring dealt with more than **240** benefits problems from residents of Pier and Golf Green wards in the financial year 2007-8, and succeeded in obtaining or re-instating benefits for many of them. The clients did not always seek advice about benefits but often the issue was picked up as a part of the holistic advice process.
- (iii) Availability of tailored advice – all CAB advisers are trained to provide holistic advice and specialist advice is available where appropriate to deal with more complex issues.
 - More than **850** enquiries from residents of Pier and Golf Green wards were dealt with by CAB Tendring in the financial year 2007-8. This constitutes around 18% of the total number of enquiries dealt with by the bureau.
- (iv) Availability of housing advice - we provide housing advice to cover disrepair, security of tenure, rent and rent increases, rent and mortgage arrears, homelessness (prevention and resolution), housing options and rights and responsibilities. We can also advise on Housing

Benefit and the Local Housing Allowance, check tenancy agreements prior to signature, check Notices Seeking Possession and facilitate effective referrals to other relevant agencies such as Fisher Jones Greenwood Solicitors who we work in partnership with for housing and family law. Tenants of private or social landlords would be more aware of their rights & responsibilities.

- The dedicated adviser at CAB Tendring dealt with more than **100** housing problems from residents of Pier and Golf Green wards in the financial year 2007-8.
- (ii) Quality of life – as a result of the information, advice and advocacy available, residents of these two SOAs should be more aware of their rights and responsibilities. Income maximisation would help alleviate the financial situation for those on low incomes, unpaid carers, etc, which will have a knock-on effect on local economic activity which that lead to an improved quality of life. Similarly, information for those returning to work on the consequences on their financial situation would also allow them to make more informed choices.

5. Community involvement

How have residents been involved in developing the proposal?

The town centre bureau performs surveys annually to determine satisfaction with the services provided. This provides useful feedback as to the developments that clients would like to see. The Bureau also maintains information about the profile of clients which reveals that since April 2006 to the present, 18% of clients have been from the Pier and Golf Green wards. Hence there is evidence-based need from residents that a dedicated service to cover these two areas would be beneficial and well-used.

6. Management arrangements?

Describe the arrangements for ensuring the proposal is managed, monitored and delivered as planned. Please give names of two references or referees (people that you've worked with before) that we can contact in advance of the appraisal process.

The Service manager of the bureau will supervise the delivery of the project. Monitoring will be on an ongoing basis, with summary reports produced on a quarterly basis.

REFERENCES

(1) Paul Feasey, Centre Manager, Signpost

Unit 5 Jaywick Enterprise Centre, Lotus Way, Jaywick. CO15 2LU

(2) Glenn Craig, Solicitor

Fisher Jones Greenwood LLP, Norfolk House, 23 Southway, Colchester C02 7BA

7. Risks

Set out the risks associated with this proposal and how you plan to minimise them.

A fully trained adviser is currently in post. There are several trained individuals in the bureau currently who could cover this post should the adviser be absent from work due to illness or unforeseen circumstances.

C Finances

	Item	£ June 08 / March 09
Capital (NM)		
Revenue (NM)	Staff and operational costs	16,610
Total (NM)		16,610
Other funding	Tendring Childrens Centre	4,000
Total		20,610

2. Value for money

Explain how this proposal provides value for money.

Since 1939 The Citizens Advice Bureau offers Free, Confidential, Independent and Impartial advice. The majority of the staff are volunteers that give up there time to be trained as general advisers and provide an administration service. Volunteers contribute time. Valued at the average gross hourly wage of £11 per hour, in Tendring the volunteers' contribution is worth approximately £116,600. This does not take into account the time given by the trustees.

In the past year 856 enquiries have been dealt with in the 2 SOA's and in excess of 4000 within the Tendring area.

The bureau provides several services in the Tendring area currently. These all operate at a substantially lower cost than those that could be provided by statutory agencies because of the lower overhead costs of operation for the bureau as a small business. Through the day to day running of the bureau the staff and volunteers offer support to those individuals who seek to return to the

work place by way of work experience and confidence building before returning to the work place.

Similarly the results achieved in terms of maximising income for residents can far outweigh the investment, and this feeds back in to direct economic activity within the district.

3. What resources are already invested by your, and other, organisations in the area on this issue?

The bureau currently operates a General Advice outreach worker in Jaywick on a one-day per week basis. In addition to this a half day service working in partnership with the Children Centre Services at Jaywick and Pier Avenue giving advice specifically for parents and grandparents caring for children under 5 years old. This advice covers all the issues that CAB generally deal with.

4. Why is NM money needed?

The service is aimed at the two most deprived SOAs in the area, both of which are within the national top 10% of deprived areas. The intention is to improve the quality of life for people in these disadvantaged areas and hence fulfils one of the SSCF's core outcomes.

5. Can you be paid this money in arrears, or do you need it to prime the project?

As there is so little time for this project to run it would be appreciated if funding could be paid by October 2008.

6. Who are your organisation's auditors? (Please attach a copy of your last set of audited accounts)

Peyton Tyler Mears Chartered Accountants, Middleborough House
16 Middleborough, Colchester, Essex. CO1 1QT

D Options

1. What other options have been considered to address this proposal and if they were, why have they been rejected?

None.

E Measuring and sustaining the impact

1. What outcomes do you hope to achieve? (i.e. overall results and benefits that relate to the delivery plan) How will the outcomes be measured?

In terms of (i) and (ii) measurable outcomes would be:

- (i) number of clients accessing the service
- (ii) number and type of issues clients for which clients are seeking advice
- (iii) increases in income achieved through accessing advice (weekly and long term basis)
- (iv) levels of debt managed by coming to the service, and levels of debt written off as a result of coming to the service

In terms of (iii) the measurable outcome would be:

- (i) statistics indicating the type of information sought by users which can help shape the services offered in that locality in the future

By performing the above work we would hope to contribute to the SSCF outcomes in the following ways:

- (i) Creating a better and safer environment – specifically advice on housing issues could help create this
- (ii) Improved quality of life and opportunity – making residents aware of their rights and responsibilities will lead to an enhanced quality of life and social responsibility, and will alleviate problems for those socially excluded by virtue of their race, disability, gender, etc.
- (iii) Increased community involvement – by promoting the services in these areas, more residents are likely to offer their services on a voluntary basis as awareness of their impact increases

2. What monitoring arrangements will be put in place?

Set out your milestones (what you will have done by when) and outputs (things you can count to measure your activities) How will spend be monitored?

Milestones:

- (i) production of monitoring reports highlighting services accessed and with which issues, quarterly for periods starting Oct 2008 (Different if preferred).
- (ii) Monitoring of financial spend, as and when required.
- (iii) Final written report describing success of service, end March 2009

Outputs:

In terms of providing face-to-face or telephone advice:

- (i) number of clients accessing the service
- (ii) number and type of issues for which clients are seeking advice
- (iii) increases in income achieved through accessing advice (weekly and long term basis)
- (iv) levels of debt managed by coming to the service, and levels of debt written off as a result of coming to the service

In terms of information accessed via the kiosk:

- (v) statistics indicating the type of information sought by users which can help shape the services offered in that locality in the future

3. Evaluation

How will you measure success and use lessons learnt?

Success will be measured by the metrics indicated in (2) above.

Lessons learned can be taken from individual cases and their effect noted on the economic improvement achieved collectively.

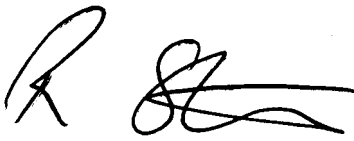
4. The long term and future

How will the benefits be sustained when NM resources are no longer available?

The provision of the adviser and the information kiosks previously funded by the Interaction Partnership, will highlight the advice services available, which should increase awareness of the residents of the advice they may continue to seek from existing bureau services in the future. The information kiosks that were set up in the 2 wards in 2007 will continue to be available for two years, as the initial cost includes three years' maintenance (comes as standard within the purchase).

Appraisal and approval structures

Amount of funding	Appraisal method	Approval required
Up to £2.5k	Neighbourhood Manager can carry out appraisal and submit for approval	Neighbourhood Manager and 2 Board members one of whom should be a resident board member if possible
Over £2.5k	Neighbourhood Manager and two board members one of which should be a resident board member if possible must go through the project appraisal form and submit for approval	Full Board

Signed:  (project proposer)

Date: 25 July 2008

Name: Rhonda Starling

Tendring CAB continuation of service 08/09

Appraised by Sharon Alexander 4 August 2008

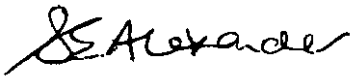
Summary	Yes/no	Notes / changes required
Does this proposal impact on mainstream services or resources?	Yes	
Do we know what level of service are delivered by and resources committed to the area by this organisation?	Yes	
Will this help us achieve our agreed outcomes?	Yes	
Is it based on the needs and wishes of local people? Have they been involved in the creation of the project idea?	Yes	
Will it make a lasting difference?	Yes	
Is this a substitute for mainstream funding?	No	
Does it provide best value?	Yes	
Is it too risky?	No	
Are we confident it will be well managed, monitored and evaluated?	Yes	
Section A	Yes or no	Notes / changes required
Is it clear what is being proposed?	Yes	
Is it clear how much money is required?	Yes	
Is it clear who the responsible organisation is?	Yes	
Section B		
Is it a convincing proposal in terms of setting out problems, objectives and activities?	Yes	

Will the proposal contribute to the delivery plan outcomes?	Yes	
Is it clear how the proposal relates to existing service delivery in the area, and neither substitutes nor duplicates related services?	Yes	
Have residents been adequately involved in developing the proposal (or their views taken into account)?	Yes	
Are management arrangements adequate?	Yes	
Have risks been adequately considered and planned for?	Yes	

Section C	Yes or no	Notes / changes required
Are the finances clear and reasonable and do they provide adequate detail?	Yes	
Does the proposal provide value for money?	Yes	
Is adequate information provided on the resources already invested by the organisation?	Yes	
Is an adequate explanation provided for why NM money is required?	Yes	
Section D		
Have other options been adequately considered?	No	
Section E		
Have measurable outcomes been identified?	Yes	
Are adequate monitoring arrangements in place?	Yes	
Are mechanisms in place for evaluation?	Yes	
Is it clear how the benefits can be sustained?	Yes	

Decision of appraisal panel

Recommend approval	Yes
Do not recommend approval	
Recommend changes required before approval	
If so, please state or refer to above sections	

Name	Sharon Alexander
Signed	
Date	4 August 2008

Tendring CAB continuation of service 08/09

Appraised by Teresa Stephenson, 1 August 2008

Summary	Yes/no	Notes / changes required
Does this proposal impact on mainstream services or resources?	No	
Do we know what level of service are delivered by and resources committed to the area by this organisation?	Yes	
Will this help us achieve our agreed outcomes?	Yes	
Is it based on the needs and wishes of local people? Have they been involved in the creation of the project idea?	Yes	
Will it make a lasting difference?	Yes	
Is this a substitute for mainstream funding?	No	
Does it provide best value?	Yes	
Is it too risky?	No	
Are we confident it will be well managed, monitored and evaluated?	Yes	
Section A	Yes or no	Notes / changes required
Is it clear what is being proposed?	Yes	
Is it clear how much money is required?	Yes	
Is it clear who the responsible organisation is?	Yes	
Section B		
Is it a convincing proposal in terms of setting out problems, objectives and activities?	Yes	

Will the proposal contribute to the delivery plan outcomes?	Yes	
Is it clear how the proposal relates to existing service delivery in the area, and neither substitutes nor duplicates related services?	Yes	
Have residents been adequately involved in developing the proposal (or their views taken into account)?	Yes	
Are management arrangements adequate?	Yes	
Have risks been adequately considered and planned for?	Yes	

Section C	Yes or no	Notes / changes required
Are the finances clear and reasonable and do they provide adequate detail?	Yes	
Does the proposal provide value for money?	Yes	
Is adequate information provided on the resources already invested by the organisation?	Yes	
Is an adequate explanation provided for why NM money is required?	Yes	
Section D		
Have other options been adequately considered?	yes	
Section E		
Have measurable outcomes been identified?	Yes	
Are adequate monitoring arrangements in place?	Yes	
Are mechanisms in place for evaluation?	Yes	
Is it clear how the benefits can be sustained?	Yes	

Recommend approval	Yes
Do not recommend approval	
Recommend changes required before approval	
If so, please state or refer to above sections	

Name	Teresa Stephenson
Signed	<i>Teresa Stephenson</i>
Date	1 August 2008