



## **SERVICE LEVEL AGREEMENT**

*Between*

The City of York Council (CYC) West Offices York, YO1 6GA	<b><i>And</i></b>	York and District Citizens Advice York (CAY) West Offices York, YO1 6GA
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For the period 1<sup>st</sup> April 2019 to 31<sup>st</sup> March 2020 a payment of £131,200 per annum.

The payment is subject to the organisation continuing to provide the activities summarised below.

### **1. SERVICE / ACTIVITY TO BE PROVIDED**

- A comprehensive General Advice Service providing information, advice and guidance from its principle office in West Offices.
- Specialist casework interviews covering welfare benefits, immigration and family law.

The areas of advice and information will include: welfare benefits, debt, housing, employment, immigration/nationality, relationships, consumer, taxes, health, community care and any other area of civil law.

The office is open to the public Monday to Friday 9am – 5pm excluding Public Holidays. A drop-in generalist advice service is available three days a week where no appointment is necessary. CAY will be closed on Bank Holidays and over the working days in between Christmas and

New Year bank holidays. CAY does however arrange an emergency team of staff and volunteers ready to respond to a crisis. The contact telephone and email details of the emergency team are to be shared with CYC officials.

Alternatively, contact can be made via telephone to the 'Adviceline' (operated in conjunction with 3 other local Citizens Advice offices across North Yorkshire).

Clients accessing advice by either route will be given a brief initial check to establish their needs and the best way they can be dealt with. Where it is established that a client needs specialist support (i.e. casework) then a referral can be made to an appropriate provider either within (by appointment) or outside of CAY.

Outside of the 'drop-in' hours, advisors see clients by appointment and undertake casework as necessary. All advice is written up in case notes by volunteers and staff.

This SLA does not cover General Advice provided at a number of outreach locations around the City or specialist advice on a number of topics, particularly debt, all of which are funded separately by a number of different organisations including City of York Council for some projects (Listed in Appendix 1). Statistics provided for the purposes of monitoring this SLA will not include services provided at outreach locations.

**Support for citywide and council priorities:** The work of CAY is especially relevant to the on-going work of the council's Financial Inclusion Strategy.

## **2. SERVICE STANDARDS, STATUTORY AND POLICY CONDITIONS**

a. CAY will comply with the following statutory requirements and provide evidence as and when required by CYC:

- Charity Commission
- Companies House
- Financial Conduct Authority
- Health and Safety Legislation
- Equalities Legislation
- All necessary insurances including PI, PL and EL

- Formal and publicised Complaints procedure.
- b. CAY will be guided in relation to this agreement by the principles and good practice set out in the York Compact.
- c. CAY continues to be a member of Citizens Advice (the national organisation) and hold the AQS quality mark or any other relevant qualifying standard/criteria.
- d. CAY complies with GDPR/DPA requirements. All staff and volunteers receive GDPR Training; policies are annually reviewed by Trustees

### **3. MONITORING & REVIEW CONDITIONS AND ARRANGEMENTS:**

CAY will provide:

- Key statistical information as outlined in appendix 2 within 3 weeks of the quarter end (30<sup>th</sup> June, 30<sup>th</sup> Sept, 31<sup>st</sup> Dec and 31<sup>st</sup> March)
- Details of any changes in paid personnel especially where this may have impacted on service delivery.
- Details of any new funding received or funding applied for
- Any service developments started or planned including new partnerships and efficiencies.
- Number of volunteers and estimated nominal value

City of York Council will:

- a) Provide 2 x 6 monthly payments in advance for each financial year of the agreement. The first payment will be made on receipt of the signed service agreement. The second will be made in October of the relevant financial year following a satisfactory 2nd Quarter monitoring report.
- b) Provide a reasonable level of information, advice and support to the organisation in connection with this agreement. This will also include:
  - engaging with other partners in assisting CAY in creating capacity to achieve mutual objectives

- advice and support in developing future CAY business plans.
- c) Through the authorised signatory, will meet with representatives of the organisation each quarter to monitor and discuss the agreement. Further meetings may be arranged on request; this may include visits, review meetings, inspection of records and financial accounts relating to the funding with 14 days notice.
- d) Provide CAY with a record of the quarterly meeting within 14 days.
- e) Be guided in relation to this agreement by the principles and good practice set out in the York Compact.

## **5. FUNDING CONDITIONS: leave in from previous agreement**

- a) CAY will:
  - submit its annual report and accounts as soon as these are available;
  - inform the council of any changes to its Constitution, Management Board or contact representative as soon as practicably possible;
  - inform the council of any changes to its charging policy, staffing arrangements or delivery of the service or activity as soon as practicably possible;
  - notify the council in advance of any draft reports, marketing or media releases that mention the council or its services;
  - meet Citizens Advice national requirements for Quality of Advice Audit.
- b) The agreement may be terminated immediately if there is a material failure by CAY to fulfill the terms of this agreement.
- c) The council may require CAY to repay all or part of the funding if:
  - the funding is not used for the service or activity specified and by CAY only;
  - CAY is not able to provide the service or activity specified to the agreed standard;
  - CAY is wound up or otherwise ceases to exist.

d) The terms of the agreement may be varied or the agreement terminated by mutual consent of CAY and the council but with 3 months notice as per the York Compact.

**6. SIGNATURES:**

a) This agreement is accepted on behalf of CAY by the authorised officers:

Position	Signature	Print name
Date		

b) This agreement is accepted on behalf of the council by the authorised officer:

Position	Signature	Print name
Date		

## **Appendix 1:**

### **CAY Outreach General Advice and other outreach not covered by this SLA**

Some of these services are currently funded or part funded by City of York Council, but are subject to separate monitoring arrangements.

CAY offers a variety of other services including specialist advice appointments and drop-ins in a variety of locations throughout the City – often in areas of deprivation. These services draw and rely on the centralised skills and personnel offered by CAY including: central training, volunteer management and Service Delivery Manager/Advice Session Supervisor and Quality Assurance (QA) process. The projects include charges for some general management and office costs. These following projects therefore draw on CAY resources and skills:

- Outreach advisor appointments (provided by a paid advisor in GP surgeries). These are held in Priory Medical and York Medical Group surgeries at Rawcliffe, Heworth, Cornlands Road, Acomb, Tower Court surgeries (3 days per week).
- Advice appointments (provided by a paid advisor) in Haxby Oaken Grove (1 day per month), Wigginton (2-days per month); Huntington Community Centre (2 days per month) and a drop-in service with a paid advisor Tang Hall Community Centre (one day weekly) funded by Tang Hall Big Local. Local Wards/Parish Councils fund the appointment sessions.
- Head Injury/Stroke Advisor service, York Hospital (2-days per week). Paid for by donation from SJP Law.
- Information Cafes held at Travellers Trust (every Monday), Bell Farm (every Wednesday); Sanderson Court (every Thursday) and St.Lukes. Clifton Information Cafe (every Friday). Information (including guiding residents on how to use the internet and access information for budgeting, benefits, energy etc) is provided by paid advisors and Information Assistants.

- CAY Specialist Debt Service provides 3 days per week of paid advisor hours each week; Specialist Debt advice and casework appointments provided by a full-time paid advisor, funded by the Money Advice Service (MAS) via National Citizens Advice.
- Advice appointments and drop-in provided at Lidgett Grove, Acomb/Hull Road and Clements Hall paid for by local Wards (3 days per week).
- Energy Best Deal advice at a number of pop-up locations.
- Services funded by the Department of Work & Pensions to deliver Universal Credit support.

## **Appendix 2**

### **Statistical information to be provided to City of York Council by CAY on a quarterly basis:**

Total Drop-in hours

New Clients seen and number of issues

Clients not seen at Drop-in i.e. Turned away/could not wait

Enquiry by Channel; i.e. f2f, telephone, web-chat etc

Adviceline stats: Total calls answered per qter/Total calls originating from York

Breakdown of problems by enquiry

Breakdown of top 3 issues (top 10 types of issue)

Financial Outcomes

- Income gains
- Debts managed or written off

Profile of Clients

- Gender
- Age
- Disability
- Ethnic Origin
- Breakdown of Clients by Ward