



## **SERVICE LEVEL AGREEMENT**

*Between*

The City of York Council Communities and Equalities West Offices York, YO1 6GA	<b><i>and</i></b>	York and District Citizens Advice Bureau 3 Blossom St, York, YO24 1AU
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For the period 1<sup>st</sup> April 2015 to 31st March 2018 a payment of £122,500 per annum.

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

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

The grant contributes to the running costs of the specialist advice and information service:

- Providing a comprehensive service of independent advice, information and advocacy on a wide range of issues including housing, immigration/ nationality, relationships, consumer problems, taxes, health, utilities, community care, education and any other issues brought in.
- Specialist advice provided for welfare benefits, debt and employment issues.
- The bureau operates an open door policy and provides email and letter advice, drop-in advice sessions, telephone advice and face to face appointments.

**Support for citywide and council priorities:** At a citywide level the work of York CAB is especially relevant to the on-going work of Inclusive York Board, the Homelessness Strategy and the Child Poverty Strategy.

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

### **a) The organisation will comply with the following general and statutory requirements:**

- Charity Commission legislation
- Health and Safety legislation: including development and implementation of a Health and Safety policy for the organisation
- Equality Act 2010
- Arrange Public liability and employers insurance consistent with the range and manner of services provided
- Development and implementation of a Complaints procedure.

b) The organisation will be guided in relation to this agreement by the principles and good practice set out in the York Compact.

c) The organisation will additionally comply with the requirements of the Citizens Advice Membership scheme.

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

a) The Council will monitor the performance of the organisation in carrying out the service or activity funded. This may include visits, review meetings, inspection of records and financial accounts relating to the funding with 14 days notice.

The organisation will submit monitoring reports to the Council as set out below.

### **b) Performance Indicators**

The Council will monitor the activity/service provided by the organisation using the following performance indicators:

Outcome	Measure
<p><b>Generalist Advice and Information Services</b></p>	<p>Meet Citizens Advice national requirements for Quality of Advice audit.</p> <p>Provide overall breakdown of number of clients advised in each year of the contract, and overall number of issues dealt with.</p> <p>Overall number of issues broken down by Ward for each year of the contract.</p> <p>Continue to expand the number of people that the CAB assists. <b>Target 5% increase year on year over the lifetime of the contract.</b></p>
<p><b>Specialist Advice</b></p>	<p>Tracking of Income generated for clients in period; extent of income maximization as a result of CAB welfare benefits advice and support. <b>Target 5% increase year-on year over the lifetime of the contract</b></p> <p>No. of clients debts managed or written off</p> <p>Employment cases, including where clients achieves monetary gain</p> <p>Numbers of clients advised in the period / individual cases completed in period.</p> <p>Breakdown of the different type of benefits issues i.e. housing, child benefit, pension credit etc.</p> <p><b>Target 5% increase of specialist advice cases year-on-year over the lifetime of the contract.</b></p>
<p><b>Adviceline</b></p>	<p>Number of calls made to Adviceline over the lifetime of the contract.</p>

	<p>Number of General Advice appointments resulting from Advice Line telephone calls over the lifetime of the contract.</p> <p>Number of referrals onto other specialist agencies through Gateway assessment process.</p> <p><b>Target 5% increase year-on-year over the lifetime of the contract.</b></p>
<p><b>Future Direction and Development</b></p>	<p>CAB will work to expand its funding base in order to sustain its current work and expand the work it does as set out in its Strategic Plan 2010-13.</p> <p>This currently includes seeking funding to carry out Outreach work to maximize income for families in poverty, transform the CAB reception area into an Information Centre, carry out Financial Capability work with adults and children, and work to support particularly vulnerable clients.</p> <p>CAB to actively participate in appropriate City-wide strategic forums – Inclusive York Board, Child Poverty Strategy etc.</p>
<p><b>Volunteer Development</b></p>	<p>Continue to retain and develop the skills of volunteers. Up-skill and supervise 10 more volunteers to help clients with advice over each year of the contract.</p> <p>Look to recruit new Volunteer Information Assistants for the CAB City Centre premises.</p> <p>Monitor numbers of volunteers involved completing training, involved in social policy developments, partnership work etc.</p>

**c) Bi-Annual Reviews**

The Council will carry out Bi-Annual Reviews with the organisation by (31<sup>st</sup> October and 30<sup>th</sup> April) in each year of the contract. This will include a review of performance as set out in the agreement and the continuing need for the service or activity. The Council will provide the organisation with a record of the Bi-Annual Review within 14 days of the Annual Review.

**4. CITY OF YORK COUNCIL CONTRIBUTION**

- a) The Council will make 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 6-month monitoring report.
- b) If requested the Council will provide a reasonable level of information, advice and support to the organisation in connection with this agreement. The organisation should contact the authorised signatory of the Council in the first instance to discuss what support may be available.
- c) The Council, through the authorised signatory, will meet with representatives of the organisation at least once a year to monitor and discuss the agreement. Further meetings may be arranged on request.
- d) The Council will be guided in relation to this agreement by the principles and good practice set out in the York Compact.

**5. FUNDING CONDITIONS:**

- a) The organisation will:
  - submit its annual report and accounts as soon as these are available.
  - inform the Council of any changes to its Constitution, Management Committee 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
- b) The agreement may be terminated immediately if there is a material failure by the Organisation to fulfill the terms of this agreement.
- c) The Council may require the Organisation to repay all or part of the funding if:
- the funding is not used for the service or activity specified and by the named organisation only
  - the organisation is not able to provide the service or activity specified to the agreed standard
  - the organisation 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 the Organisation and the Council.

**6. SIGNATURES:**

- a) This agreement is accepted on behalf of the Organisation 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		