



**CITIZENS ADVICE
LANCASHIRE WEST
TASK GROUP
Draft Report**

CHAIRMAN

Councillor Cartridge

TASK GROUP MEMBERS

Councillor Lady Dulcie

Atkins

Councillor Callum Baxter

Councillor Mary Belshaw

Councillor Maureen Blair

Councillor Paul Ellison

Councillor Henry Jackson

Councillor Adam Leigh

Councillor Ken Minto

Councillor Michelle Moliner

Councillor Jane Preston

Overview and Scrutiny Committee

Chairman: Councillor Peter Cartridge

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Introduction

Wyre Borough Council and the Citizens Advice Lancashire West (CALW) service have had a historic working agreement for over a decade. The service provides free, confidential, impartial and independent advice and information on a wide range of subjects.

Since 2011, task groups have been commissioned to review the service agreement between the council and CALW and to recommend to Cabinet whether to renew the agreement.

This was last agreed in 2021, where the council entered into a three year agreement with CALW, until May 2024. It was therefore recommended by officers that a task group be once again commissioned to review the service; particularly post-Covid, it was important to review any changes to the service.

The following report provides a summary of all the evidence that was presented to the task group alongside their conclusions and final recommendations.

Aim of review

The aims of the review, as specific within the scoping document (attached at Appendix A) were as follows:

- To assess and review the working partnership and Service Level Agreement between Wyre Council and the Citizens Advice Lancashire West service
- To make recommendations to Cabinet regarding the service level agreement and future service provision.

The review process

For its first meeting, the task group invited the Corporate Director Communities, Marianne Hesketh. The group then interviewed Diane Gradwell, Chief Executive of CALW, at its second meeting, and submitted written questions to the Corporate Director Resources, Clare James, the Resources Portfolio Holder, Councillor Lesley McKay and the Head of the Contact Centre, Peter Mason.

The group also received additional documentation provided by Citizens Advice Lancashire West on the following:

- Service overview for 2019-2023;
- Issues dealt with within Wyre;
- Costings for the service provided within Wyre;
- The advocacy service they provide;
- Information on where the most need/demand is in the borough.

The group also reviewed the service level agreement from 2017, previous task group and Cabinet reports from 2021 and 2017.

Summary of evidence provided by Marianne Hesketh, Corporate Director Communities

Marianne Hesketh, the Corporate Director Communities, attended the first meeting of the task group to provide context for the review. Documentation had been supplied by Citizens Advice in advance of the meeting.

Marianne informed members of the task group of the council's historic working arrangements with the CALW service, and gave members a brief overview of the last review in 2021. With the service agreement coming up for renewal in May 2024, the group was meeting to allow enough time to review the service level agreement and to consider any recommendations for a successful review prior to producing a report to Cabinet.

She explained to members that the council paid a grant payment of £30,000 a year; at the last review, £8,000 had also been set aside to participate in a trial of digital kiosks/self-help terminals at a number of locations across Wyre. However, this trial had never taken place and the money had been kept aside.

The members and the Director had a discussion about the use of two retail units at Fleetwood Market and offices at Poulton Road. It was highlighted that the service level agreement from 2017 had never been updated, and it would be necessary to clarify the use of these spaces and to potentially formalise their use following a review.

She said that overall, should the agreement be renewed, a new service level agreement would be needed to reflect the current service level.

Marianne Hesketh was asked a number of questions in relation to the quality of the service and the working relationship between the council and CALW. The following are relevant to the group's aims:

- What consequences would there be if the group recommended not to renew the agreement?

Answer: Residents would still be able to access the national service, however this would be limited to telephone support.

- Did the council have the ability to bring calls in-house?

Answer: Historically, the council had two in-house debt advisors. However, at this moment in time they did not have the capacity to bring this service back and would also need well-trained and knowledgeable staff.

- What were the reasons provided in regards to the delay of the trial for the digital kiosks/self-help terminals?

Answer: This was due to staffing and personnel issues and the impact of Covid-19.

Summary of evidence provided by Diane Gradwell, Chief Executive of Citizens Advice Lancashire West

Diane Gradwell, Chief Executive of Citizens Advice Lancashire West, attended the second meeting of the task group to answer questions from the task group.

Questions had been agreed and circulated in advance of the meeting; Diane submitted written responses to the questions below:

- 1. Can you give a cost breakdown of the grant payment from Wyre Council, and what this is used for? With this, can you provide the group with the latest accounts with the Charity Commission, management accounts and internal audit documents for review?**

Please see attached. Also attached is a full service overview document for the years 2019 – 2023.

- 2. What current outreach do you provide, including both face to face and alternatives? How has the use of the units at Fleetwood Market and the offices at Poulton Road impacted on this?**

There is no provision within this current contact for outreach. We employ an Advice Session Supervisor (ASS) on site at Fleetwood Market, which is our main face to face location. It is a quality/support requirement that all volunteers have qualified on-site support. The ASS is also required to provide advice services directly to clients. Currently we are experiencing high volumes of clients wishing to access this location.

In addition to the face to face service we also provide 5-day per week generalist advice telephone, email, webchat and video call services, which again employs an ASS qualified to oversee and deliver this multi-channel service.

Other services we deliver for Wyre residents:

- Specialist debt and welfare benefits services funded through MaPS national contracts. It is a requirement of this contract that face to face services are restricted to vulnerable clients.
- Pension Wise is a MaPS funded programme providing guidance around people's pension options. Available to anyone aged 50+ and delivered with funder restricted face to face provision.
- Macmillan funded welfare benefits project for people with cancer.
- Energy Advice

- 3. How many of the 2017 and 2021 recommendations from previous task group reviews have been actioned? Specifically, can you please explain the current situation with the trial of the digital kiosks as agreed at Cabinet in June 2021?**

The digital kiosks are still in the development stage as unfortunately, following the untimely death of Guy Simpson, work was postponed. However, no contract or funding was ever received from yourselves for this work.

4. Given the current demand on services, can you provide any forecasts of demand, particularly focussing on Over Wyre? Are there any steps currently being discussed to improve services in the rural areas?

Initially this funding we designed to provide 2 days per week of outreach only. However, due to demand for increased services and the need to recruit and support volunteers, it was agreed with the Council to have a dedicated location. Your representative on our Trustee Board at that time arranged for accommodation within the offices at Poulton Road. This development obviously increased costs, which have been borne by the Charity since that time. The move to Fleetwood Market was again agreed with yourselves to help increase the footfall within the market. Due to the ongoing costs of servicing two locations the Charity moved to the market entirely.

However, what we are experiencing is lack of private interview space. It is a requirement of our service that all client interview must be held in a private space. We would be happy to discuss alternative locations.

5. In the event the support through the Council was not renewed, how would this impact residents? Has the service considered additional or alternative funding through other means, such as the national charity or through government?

Funding for generalist services does not attract project funding. As with our other local authority partners we rely on funding for generalist services. However, as mentioned above LA funding does not cover the true cost of this service delivery and has been/is currently being subsidised by the Charity.

6. In the event support was renewed, and the use of spaces in Fleetwood formalised, would there be a potential for support to Fleetwood Market for the use of the units?

As previously mentioned the service is already being subsidised by the Charity. However, given the issue with private interview space within the market additional/alternative accommodation may have to be sought. Again we are happy to work with the Council to look at alternative venues and/or methods of service delivery.

In addition to the written responses, Diane answered questions from members.

Diane explained to members that with the trial of the digital kiosks, at the time they had not received the £8,000 set aside for this. Currently, their ICT department had the capacity and knowledge to move this forward, but at the time it was delayed due to personnel issues.

However, she highlighted to members that the service saw the biggest call for face to face outreach in Wyre. Within the current space at Fleetwood Market, they often saw queues of clients going out of the doors; this was not just due to the high demand, but due to the lack of private interview spaces they needed. She felt that the service was under pressure to provide face to face outreach; this was impacted by the loss in volunteers by almost 50%, and the lack of physical space to place their volunteers.

In response to a question, Diane explained to the group that the demand for face to face outreach in Wyre but specifically Fleetwood was due to several factors, including the ability of residents to travel to get the service. Many clients felt more comfortable speaking to someone privately, face to face. She informed members that this was across the spectrum, and not down to age.

Members asked what the additional value was to the council, above and beyond the provisions set out in the service level agreement. Diane explained that they provided the general service, but with the rising figures of client numbers and issues they supported residents with, they increased the level of service they provided to the community. The charity itself matched the contribution given by the council and brought in other specialist services. Without the contribution from the council, they would not be able to provide the service at all; however, the agreed upon amount had initially been for one person, two days a week. Due to the rise in demand, and the agreement on the venue space in 2021, the service now provided two paid members of staff to supervise volunteers, five days a week, alongside telephone and web services.

They were not able to provide the service with just volunteers; they required a trained supervisor, which was what the grant contribution paid towards. The telephone services were accommodated by volunteers in the call centre in South Ribble, or picked up nationally.

Diane gave verbal information on the contribution levels of other councils in the North West; with Chorley contributing £56,000, South Ribble £50,000 and West Lancashire £50,000. She also informed members that Blackburn with Darwen had entered into a contract with Citizens Advice to take over their service, and so they now worked as part of the council.

She concluded to the group that the service could not ignore the need, despite that the contributions did not satisfy the amount required to increase the service. The service level agreement, unchanged since 2017, did not reflect the current service provision. She highlighted that accommodation was an issue, and the service could not provide a contribution towards Fleetwood Market. However, she agreed that they needed to diversify their location of face to face sites and wanted to expand their outreach, but the space needed to be suitable for their needs.

Summary of evidence provided by Clare James, Corporate Director Resources, and Councillor Lesley McKay, Resources Portfolio Holder

For the third meeting of the task group, it had been agreed to put together questions and circulate these to the Corporate Director Resources and Portfolio Holder Resources. Questions revolved around the financial impact of outsourcing the service versus providing this in-house, and the trial of the digital kiosks.

Responses were received from the Portfolio Holder, Councillor McKay, Corporate Director Resources, Clare James, Corporate Director Communities, Marianne Hesketh, and Head of the Contact Centre, Peter Mason. A briefing note had been presented to the group, and is included below:

The council understands the need demonstrated for the services provided by Citizens Advice and values the work the service and its volunteers provide for the people of Wyre.

A number of years ago, the council employed two in-house debt advisors, which reduced to one and then none as the work eventually dried up as residents preferred to use a service independent of the council e.g. Money Advice Service and National Debtline (Debt advice – Wyre Council). In order to ensure that some provision of free debt advice was available locally to residents, the council agreed to continue to support the service provided by CALW where we had existing relationships and value for money could be achieved.

The provision of an in-house service providing debt advice would cost significantly more than current grant contributions to CALW.

It has been suggested by the task group that the grant contribution payments to CALW be increased over and above the current £30,000 level. The task group have also suggested releasing the contribution towards the digital kiosks trial, which was previously agreed in 2021.

Rather than consider the £30,000 current cash contribution as Wyre's subsidy, the in-kind amount for the use of Fleetwood Market units, should the service remain there, should also be factored in. This roughly equates to £18,000 per annum, thereby bringing Wyre's contribution more in line with other local authorities at £48,000. Any decision to renew and/or increase the service agreement and its contributions to CALW will have a negative impact on the gap in the medium term financial plan (MTFP) as this provision runs out in 2023/24 pending further approval from Cabinet.

In terms of the digital kiosks trial, it may be possible to re-start the project and to release the funds. However, this project was a response to Covid-19 and it may be felt that other solutions have rendered this one no longer required.

Supporting documents

Elected members were presented with a number of additional documents that supported them in their work.

The documents are hyperlinked below. If you require any assistance with accessing these, please email democratic.services@wyre.gov.uk

[Citizens Advice Lancashire West service overview 2019-2023](#)

[Service level agreement between CALW and Wyre Council, 2017](#)

[Wyre issues 2021-2023](#)

[Cost of living data](#)

[Additional data](#)

[Costings for Wyre](#)

[Cabinet report, 5 June 2021](#)

[Full minutes pack of the Citizens Advice Lancashire West task group](#)

Conclusions and recommendations

After reviewing the evidence presented, the task group concluded that the service ought to be renewed and that they provided a valuable resource for residents. It was vital that this service was provided for residents and the council at this moment was not in a position to do so in-house.

The task group concluded that the face to face outreach provision needed to continue in Fleetwood, but that more work needed to be done to increase this for residents, particularly in the west of the borough. This could potentially be done by starting the trial of the digital kiosks.

Finally, the task group agreed that the service level agreement needed updating, but equally that the financial contribution from the council needed to be reviewed. The service had taken the decision to increase its provision to meet the demands experienced, and it was important this be reflected in an updated service level agreement and the contributions reviewed.

Following from their conclusions, the task group propose the following recommendations be made to Cabinet:

Recommendation One: That Cabinet renew the agreement between the Council and Citizens Advice Lancashire West for four years.

The group acknowledges the need and demand for the service by the residents of Wyre and praises CALW for their work during the pandemic and beyond. The group understands that the council is no longer in a position to address this need themselves, and the desire from residents for a more independent body.

The service has provided good value for money, enabling a much higher number of residents to access advice services than would be possible for the council to deliver itself.

By recommending that the agreement be renewed for four years, this matches the new Council Plan period.

Recommendation Two: That Cabinet considers increasing the grant contribution payment to Citizens Advice Lancashire West from £30,000 as per previous service agreement renewals.

Following the pandemic and the cost of living crisis, CALW has demonstrated an increase in demand for their service (according to their 2019-2023 Service Overview) and increased the provision for Wyre from two days a week of outreach to five, including telephone, video call services and web services.

The service has informed the group that in order to meet the demand of residents, they have matched the council's contribution in order to meet these growing levels of demand.

The group acknowledge that the council has waived the rental and service charges for the use of the units at Fleetwood Market and would recommend this be continued. However, the group believes that additions to the service of three more days of face to face outreach, telephone, video conferencing and web services should be continued and therefore should have an impact on the level of funding, beyond the in-kind contribution of approximately £18,000 for the market units. Equally, the level of funding has remained the same for over a decade, not taking into account the changing financial environment.

If the required services are not delivered by CALW, or by the Council, in the first instance, this could result in greater financial impact on the borough longer term.

If Cabinet are minded to approve, then the service level agreement ought to be updated as this has not happened since 2017. If this is agreed, it is important that this be formalised and agreed by both parties.

Recommendation Three: That within an updated service level agreement, the use of the units at Fleetwood Market and the in-kind contribution be added to formalise their use.

The use of the two units in Fleetwood Market was discussed and agreed during the 2021 review and subsequent Cabinet report waiving the cost per annum rent plus service charge, however this has not been formalised within the service level agreement.

During discussions with representatives from CALW, members noted the importance of having a premises designated for face to face outreach and noted the high demand from residents for this.

The service has also experienced the biggest calls for face to face outreach in Fleetwood, with the majority of clients being in Fleetwood.

The group also acknowledge that for many residents, travel to Fleetwood may not be feasible. The group would also ask Cabinet to consider opening discussions in the future for a potential move or additional premises for the service, who require private interview space for their clients.

Recommendation Four: That the Council and Citizens Advice Lancashire West consider re-starting the trial of the digital kiosks, particularly over Wyre, and for the £8,000 set aside for this in 2021 be released.

It was agreed as a recommendation of the 2021 review to trial the digital kiosks/self-help terminals, particularly Over Wyre to improve outreach in the more rural areas.

Due to staffing capacity issues, the trial was put on hold and the moneys set aside for a future project.

The task group acknowledge the need to provide a version of face to face outreach in the more rural areas to ensure that all residents are catered for.

It has been confirmed that this amount has been set aside and that CALW would be willing to re-start the trial.

Whilst discussions around the location of any face to face outreach may be ongoing, it is important that all residents have the ability to access the service, especially those who cannot access it via telephone, video conferencing and the website.

In order to review the trial, the task group recommend that representatives from CALW and the Council's representative on their Board of Trustees update the Overview and Scrutiny Committee on biannual basis.

Councillors' attendances

There were four meetings of the task group.

NAME	MEETINGS ATTENDED (maximum 4)
Councillor Lady Dulcie Atkins	4
Councillor Callum Baxter	1
Councillor Mary Belshaw	2
Councillor Maureen Blair	2
Councillor Peter Cartridge	4
Councillor Paul Ellison	4
Councillor Henry Jackson	3
Councillor Adam Leigh	2
Councillor Kenneth Minto	1
Councillor Michelle Moliner	1
Councillor Jane Preston	2

List of appendices

Appendix A – Citizens Advice Lancashire West task group – final scoping document

APPENDIX A

Citizens Advice Lancashire West Task Group - Scoping Document

Review Topic	Citizens Advice Lancashire West (formerly Citizens Advice Bureau)
Chair	Councillor Cartridge
Group Membership	Cllrs D Atkins, Baxter, Belshaw, Blair, Cartridge, Ellison, Jackson, Leigh, Minto, Moliner, Preston
Officer Support	Daphne Courtenage, Democratic Services Officer
Purpose of the Review	To assess and review the working partnership and Service Level Agreement between Wyre Council and the Citizens Advice Lancashire West service and make recommendations to Cabinet regarding the service level agreement and future service provision.
Essential Criteria (at least one must be marked)	<input checked="" type="checkbox"/> A council priority (as set out in the Business Plan) <input type="checkbox"/> A matter of significant, demonstrable public concern, as raised through ward councillors, local media etc.
Role of Overview and Scrutiny in this Review (mark all that apply)	<input checked="" type="checkbox"/> Holding Executive to account – Key Decision <input type="checkbox"/> Holding Executive to account – performance based <input checked="" type="checkbox"/> Community champion <input checked="" type="checkbox"/> External partnership

	<input type="checkbox"/> Contribution to policy development <input checked="" type="checkbox"/> Policy review <input type="checkbox"/> Statutory duties / compliance with codes of practice
Aims of Review / Terms of Reference	In reviewing the current arrangements of the working partnership between Wyre Council and the Citizens Advice Lancashire West service, to assess the effectiveness of the current arrangements, value for money of the service and make recommendations to Cabinet in regards to the service level agreement.
What specific value can Scrutiny add to this work area?	Ensure value for money for residents and influence executive decisions.
Methodology	<ul style="list-style-type: none"> • Review previous Cabinet decisions and task groups reports • Review performance and usage data • Compare arrangements with other Local Authorities in the area • Interview key witnesses
Limits of Review	The review will focus on the details of the service level agreement and not on wider issues surrounding debt, cost of living etc.
Potential Expert Witnesses	<ul style="list-style-type: none"> - Diane Gradwell, Citizens Advice Lancashire West Chief Executive - Marianne Hesketh, Corporate Director Communities - Mark Broadhurst, Head of Housing and Community Services - Service users
Documents to be considered	<ul style="list-style-type: none"> - Service Level Agreement - Scrutiny review report to Cabinet on 18 January 2017 and 2 June 2021 - Citizens Advice performance reports

	<ul style="list-style-type: none"> - Comparison between the arrangements with different local councils - Internal reports
Risks	The review is intended to be a very short assessment of the working relationship and also could start to focus on questions outside of the review topic.
Level of Publicity	Private.
Indicators of a Successful Review	Clear recommendations to Cabinet on whether or not to support the agreement and future service provision beyond May 2024.
Approximate Timeframe	2-3 months
Projected Start Date	November 2023