

APPENDIX A

CITIZENS ADVICE FAREHAM

SERVICE LEVEL AGREEMENT

1ST APRIL 2018 - 31ST MARCH 2020

1.0 PARTIES TO THE AGREEMENT

- 1.1 This agreement is between (1) - Fareham Borough Council (FBC) and (2) - Citizens Advice Fareham (CAF).

2.0 DURATION

- 2.1 The agreement is for a total period of two years, commencing on 1 April 2018 and expiring on 31 March 2020.

3.0 THE SERVICE

- 3.1 Citizens Advice Fareham (CAF) will provide a free, impartial and independent service of generalist advice, information, support and representation in a confidential manner to people in need of help and support who reside in the Borough of Fareham as far as it is able.
- 3.2 For the period April 2018 to March 2020 CAF will provide the service from the main offices above the Fareham Library at the following times: -
- Monday to Friday during the hours of 10.00 am – 4.00 pm.
 - The only exceptions to the specified times will be one morning every month when the Bureau will be open from 12.30 pm – 4.00 pm.
 - CAF will also be open from 5.00 pm to 6.30 pm on Thursdays.
 - As the Bureau is in the Fareham Library building, it will be closed on days when the Library is not open (e.g. Bank and other Public Holidays throughout the year)

4.0 OUTREACH SERVICE

- 4.1 For the period April 2018 to March 2020 CAF will continue to deliver its outreach services from:
- Lockwood Community Centre on a Tuesday from 10.00am - 2.00pm
 - Highlands Hub on a Tuesday from 10.00am - 2.00pm
 - Portchester Community Centre on a Thursday from 10.00am - 2.00pm

- 4.2 Providing an outreach based service delivery model is a priority. Therefore, a key aim for CAF is to utilise the grant funding provided by the Council to establish an outreach advice service at key strategic locations across the Borough, including Fareham South, Titchfield and Stubbington.

5.0 MANAGEMENT ARRANGEMENTS

- 5.1 The Trustee Board of CAF is responsible for its own overall policy and decision making and is the body accountable for the provision of the service set out in this agreement.
- 5.2 The Trustee Board, which may include up to two representatives of Fareham Borough Council (FBC), will meet at least four times per year.
- 5.3 The Trustee Board will undertake to provide the appropriate training for staff to ensure a quality of service in line with Citizen Advice (NACAB) standards.
- 5.4 This Service Level Agreement relates to the core activities of CAF, which will be provided by a combination of paid staff and voluntary advisers.
- 5.5 A copy of the CAF constitution and Business Plan is attached to this agreement (Schedule xxx).

6.0 OUTCOMES

- 6.1 A review of the existing arrangements for providing the service from the main office above Fareham Library will be undertaken by CAF and concluded by December 2019.
- 6.2 The purpose of this review will be to evaluate the current service delivery model with the aim of developing a business model which will allocate a significant amount of the grant funding provided by FBC to delivering an outreach service model.
- 6.3 This will build on the successful trial outreach projects that are operating in Fareham North West, Portchester and Locks Heath. The aim will be to establish this outreach based approach at key strategic locations across the Borough on a sustainable basis, utilising the funding made available by Fareham Borough Council.
- 6.4 The outcome of the review will inform the arrangements for the new SLA which will be scheduled to commence from 1 April 2020.
- 6.5 To provide a new set of performance monitoring measures that focus on what is happening in the Borough of Fareham. This should reflect the issues that Fareham residents are seeking help and support for and any emerging trends based on local data. The outcome of the review will inform

the measures for the new SLA which will be scheduled to commence from 1 April 2020.

- 6.6 CAF will seek to secure funds from other sources to support the service and any unmet needs identified.

7.0 MONITORING

- 7.1 CAF will supply FBC with financial accounts and details of monthly at quarterly intervals. Quarterly liaison meetings will be held between FBC officers, the relevant Executive Member and Trustee Board representatives of CAF.

- 7.2 CAF will notify FBC of any variation from the hours of availability of the service as set out in paragraph 3.2.

- 7.3 The details of monthly enquiries will include the following information, taken from the CASE recording system:

- Number of clients helped
- Number of clients contacted
- Breakdown of client interactive channels and numbers
- Leading advice matters
- Financial outcomes recorded
- Number of outreach contracts

Statistics will be reported in the format attached to this agreement. The format may be altered during the life of the agreement, following consultation at the quarterly liaison meetings.

- 7.4 CAF will notify FBC at each liaison meeting of any work undertaken to influence good practice and of talks given to members of the public.

8.0 EVALUATION

- 8.1 CAF will invite representatives of Fareham Borough Council to its' Annual General Meeting and provide the Council with a full copy of its' Annual Report and audited accounts each year.

- 8.2 In the event that the service provided by CAF falls below that set out in the agreement in any respect, the FBC liaison officer may call an ad-hoc meeting with the representatives of the Trustee Board to consider if any appropriate action should be taken. A report of the conclusions of such a meeting shall then be prepared for the Council's Executive.

- 8.3 CAF will operate a client complaints procedure in line with the requirements of Citizen Advice (NACAB). A non-confidential summary will be made available on request to FBC.

9.0 LIAISON AND COMMUNICATION

- 9.1 CAF and FBC will appoint a liaison officer (or officers) who will be the key point of contact in each organisation with authority to speak on behalf of their agency.
- 9.2 FBC may also appoint up to two councillors to the Trustee Board. In this position, the nominated councillor(s) will act on behalf of CAF and will be separate from the nominated liaison officer(s) for FBC.
- 9.3 The FBC liaison officer(s) will not be part of CAF Trustee Board, although they can be requested to support or offer guidance to the Trustee Board or relevant officers, as and when required.
- 9.4 The role of the FBC liaison officer(s) will be as follows:
- a. To be the initial and primary point of contact within the Council for CAF.
 - b. To be consulted directly by CAF on issues, defined in paragraph 9.6, that require prior consultation with FBC as the funding partner.
 - c. To attend quarterly liaison meetings with representatives of CAF.
 - d. To provide advice, support and information to CAF as appropriate on a range of issues.
 - e. CAF will comply with all charity commission and national Citizen Advice requirements and may be required to provide evidence to this effect on request by the FBC liaison officer.
 - f. To provide information and advice within FBC on all matters relating to CAF.
- 9.5 The operation of the Service Level Agreement will be reviewed annually through the liaison meetings. Consideration will be given at these reviews to proposals from any interested party for developments and other changes in the services provided by CAF.
- 9.6 The liaison officer(s) of FBC will be consulted on any action taken by CAF in the following circumstances:
- a. Recruitment and selection of senior paid staff.
 - b. Receipt of funding from sources outside this agreement.

- c. Any decision by CAF that would increase the expenditure on the services provided within this agreement.
- d. Any decision by CAF that would lead to a direct or indirect reduction in service provided.
- e. Changes to CAF constitution.

10.0 FINANCE

10.1 The contribution towards core funding will be:

£120,000 – 2018/19
£120,000 – 2019/20

10.2 The agreement will commence from 1st April 2018.

10.3 Any or all sums paid or payable to the CAF under or pursuant to the agreement will be exclusive of VAT.

10.4 FBC will pay its grant to CAF in two 6 monthly payments. These payments will be made at least one week in advance.

11.0 INSURANCE

11.1 CAF has the legal responsibility for all insurance matters and for any claims arising from its activities. The Council reserves the right to satisfy itself of the adequacy of insurance cover, as a condition for payment of grant. A copy of the annual insurance certificate is requested upon renewal each year for audit purposes.

12.0 STATUS OF THE AGREEMENT

12.1 This Agreement is intended to indicate the intention of each of the parties. It is not intended to create a legally enforceable contract.

This agreement is dated the

Signed by: on behalf of Fareham Borough Council

Signed by: on behalf of Citizens Advice Fareham

