



EXECUTIVE

Wednesday, 8 November 2023

10.00 am

**Council Chamber, Council Offices, Brympton
Way, Yeovil BA20 2HT**

SUPPLEMENT TO THE AGENDA

To: The members of the Executive

We are now able to enclose the following information which was unavailable when the agenda was published:

Agenda Item 13 Voluntary, Community, Faith and Social Enterprise Strategic Funding
(Pages 3 - 50)

To consider the report (to follow).

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Decision Report - Executive Decision

Forward Plan Reference: FP/23/09/03

Decision Date – 8 November 2023

Key Decision – Yes

Voluntary, Community, Faith and Social Enterprise (VCFSE) Strategic Funding

Executive Member: Cllr Theo Butt Philip Lead Member for Transformation and Human Resources

Local Member(s) and Division: Not applicable

Lead Officer: Sara Skirton, Service Director – Partnerships and Localities

Author: Chris Phillips VCFSE Workstream Lead (PH Commissioning Strategic Manager)

Contact Details: 01823 359243 and chris.phillips@somerset.gov.uk

1. Summary / Background

- 1.1** The voluntary, community, faith and social enterprise sector (VCFSE) is an acknowledged key partner for the Council and broader Integrated Care System (ICS) as underlined by the signing of a new Memorandum of Understanding on 28 September 2023.
- 1.2** Further to Local Government Reorganisation Programme 6 December 2022 endorsing the LGR Joint Committee decision on 4 February 2022 to reaffirm grant funding to VCFSE organisations from April 2023, work has been led by the Partnerships and Localities service to review and consolidate agreements with the VCFSE sector to develop a more strategic, sustainable and efficient approach. The decisions in this paper relate to core funding for two key strategic partners for the Council: Citizens Advice Somerset and Spark Somerset; and the administration of small grants for voluntary groups.
- 1.3** A cross-council working group has been established to support further join-up in relation to VCFSE funding and engagement. MTFP Board has been consulted (2nd October) in informing these recommendations. MTFP Board noted that work to review and rationalise grants, including small community grants and council lotteries, is ongoing. The Board also recognised the need to provide early certainty and stability to key voluntary sector partners and to do so, that decisions need to be taken sooner.

2. Recommendations / Action required

Executive is asked to agree:

- 2.1.** To a three-year core funding agreement (Early Help and Prevention) for the period 1 April 2024 to 31 March 2027 (with options to extend 1 plus 1), for Citizens Advice Somerset (CAS) and Citizens Advice West Somerset (CAWS).
- 2.2.** To a total core funding (Early Help and Prevention strand) allocation of £629,000 in year one followed by funding of £600,000 in subsequent years for Citizens Advice Somerset and Citizens Advice West Somerset, allocated as follows -
 - i. £629,000 – CAS £581,137; CAWS £47,863
 - ii. £600,000 – CAS £552,137; CAWS £47,863
- 2.3.** To up to five-year contract, jointly funded with Somerset ICB, to support VCFSE infrastructure and sector engagement with Spark Somerset for 1 April 2024 to 31 March 2027 (with options to extend 1 plus 1), with a combined value of up to £750k per annum.
- 2.4.** To allocate a minimum £250k local authority contribution to VCFSE infrastructure per annum for 3 years.
- 2.5.** To delegate responsibility to the Service Director Partnerships and Localities in consultation with the Lead Member for Transformation and Human Resources to finalise and agree a mechanism to support a small grants process.

3. Reasons for recommendations

- 3.1** To provide assurance to the VCFSE sector, their partners, stakeholders and client groups of continuation of funding, and to take the opportunity to consolidate the number of separate agreements which the Council currently has in place through drawing together funding previously awarded. Multi-year agreements provide greater security of funding and enable VCFSE organisations greater flexibility in the delivery of outcomes and support innovation. A revised specification will also ensure consistency of service provision across the county, provide greater coherence and will reduce duplication as well as the contract management, monitoring and reporting burden.
- 3.2** Previously comprising five independent Local Citizens Advice (LCA), Mendip, Sedgemoor, South Somerset and Taunton have now merged to form Citizens Advice Somerset with Citizens Advice West Somerset (CAWS) remaining a separate entity for the time being. Citizens Advice services make a significant contribution to individuals and communities through giving free, impartial and confidential information and advice to everybody regardless of race, gender, age, religion, sexuality or disability. The impact of Covid-19 and the cost-of-living crisis has reinforced the importance of ensuring appropriate advice services are in place. Existing agreements ending on 31 March 2023 provide an opportunity to consolidate the arrangements. This provides assurances to the funders of CA specialist projects that the core business is secure and enables Citizens Advice services to effectively plan and sustain services. Separate local authority decisions will be taken in relation to Local Assistance Funding and more specialist / targeted services such as housing and homelessness.

- 3.3** The provision of support to voluntary groups is key in securing a strong, vibrant VCFSE sector which supports and can help deliver Somerset Council's ambitions for the county and its residents. Spark Somerset is Somerset's sole council for voluntary service and the recognised countywide VCFSE infrastructure provider. Spark is a member of the National Association for Voluntary and Community Action, the national co-ordinating body for infrastructure organisations. Infrastructure support enables individual VCFSE groups and organisations to develop, improve and sustain their services through the provision of training for staff and volunteers, advising on operational and governance policy and procedure, assisting with funding applications and bid writing, and ensuring safeguarding responsibilities are met. The support also co-ordinates the voice of, and advocates on behalf of, the VCFSE sector in its partnerships with the public sector and is key to the implementation of the engagement model with the VCFSE sector.
- 3.4** There are currently several disparate legacy agreements in place with the VCFSE sector. With District agreements due to end 31 March 2024 there is the need and opportunity to rationalise and review the alignment of existing agreements to the new Council priorities and ensure a more coherent approach to VCFSE funding going forwards and greater equity in opportunities for other groups to apply for funding.

4. Other options considered

- 4.1.** If a decision is not taken now in relation to Citizens Advice and Spark Somerset, it risks destabilising key VCFSE strategic partners and, without confirmation of funding, the loss of staff and curtailed service activity. It would have a significant negative impact on the Council's reputation and undermine the Council's approach to working with the VCFSE sector which is a key stakeholder in further designing and delivering the new Authority and transformation thereafter.
- 4.2.** No alternative options exist in terms of the provision of core funding. It is a well-established fact that the vast majority of grant making charitable trusts and other third-party funders do not provide core funding. Whilst they will fund projects, which the Somerset CAs and Spark Somerset have been very successful in securing, projects themselves cannot be delivered without the surety of core funding.
- 4.3.** One option could be to provide single year funding agreements. This option was rejected as being inefficient in terms of time taken to negotiate agreements and more importantly it would undermine the ability of key strategic partners to plan their services for the longer term.

5. Links to County Vision, Business Plan and Medium-Term Financial Strategy

- 5.1.** The VCFSE sector is critical to the delivery of all four Council Plan ambitions. Working/collaborating with partners is a recurring theme in the Council Plan and the VCFSE is recognised as a key strategic partner in the shared aim of improving lives in Somerset.
- 5.2.** Priority 15 of the MTFs outlines the need to review and rationalise grants to the VCFSE, alongside Priority 16 which recognises the need to identify

transformation projects that deliver on-going savings and reductions in cost over the MTFP.

- 5.3.** The Council's Target Operating Model (TOM) speaks of a systematic approach to working with the sector in partnership whilst recognising the importance of their independence, with a stated ambition of wanting to work more with the sector so as to deliver more and better outcomes together; an ambition that would be difficult to deliver if cuts to the sector are seen as a 'soft target' to achieving savings. If the TOM objective is to be realised we need to ensure effective and sustained engagement with, and support for, the sector in influencing and shaping the new Council.
- 5.4.** Somerset Council joined Somerset Integrated Care Board in signing a Memorandum of Understanding with the VCFSE sector in September 2023. The MoU frames the strategic relationship between the Council and VCFSE sector, and the new contract will enable implementation of the agreed engagement and advocacy model.

6. Financial and Risk Implications

- 6.1.** The Council's Medium-Term Financial Strategy (MTFS) 2024/25 to 2026/27 outlines a three-year approach for balancing the Council's budget and recognises the importance of financial resources in enabling the effective planning, management and delivery of services. Strand 15 has identified the need to review and rationalise the number of legacy agreements with the VCFSE sector and recognises that some decisions relating to VCFSE may need to be taken sooner. A cross-council working group has been established to provide greater clarity as to what VCFSE engagement currently takes place, as well as what activity is currently funded and the source of this funding.
- 6.2.** The impacts of Brexit, the war in Ukraine, Covid-19, together with major change programmes within the Somerset public sector, continue to be felt by the VCFSE sector. The UK cost of living crisis has a complex impact for many charitable and community groups through rising demand, reduced funding and increase energy and staffing costs. Whilst there was a rise in Covid-19 related grant funding, this was time limited and short term and has since ended. Covid-19 also resulted in an overall decrease in the number of volunteers; a position from which voluntary groups have still not recovered.
- 6.3.** The negative impacts of reduced or stopping funding to the VCFSE, particularly at a time of increased vulnerability as they recover from the effects of both Covid-19 and the cost-of-living crisis, include: -
- i. A reduction in service delivery and innovation
 - ii. Staff redundancies
 - iii. Reduced sustainability with potential closure of organisations
 - iv. Fewer active volunteers
 - v. Devaluing their economic contribution
 - vi. Reduced ability to visibly follow through the commitment to invest in places
 - vii. Health and Wellbeing impacts
 - viii. Community Safety implications
 - ix. Emergency response undermined
 - x. Potential breach of the Public Sector Equality Duty
 - xi. Reputational damage to the council

xii. Increased costs to the council

6.4. This proposal was considered by the MTFP Board on 2 October 2023.

6.5. The arrangements with Citizens Advice and with Spark will be developed and led by the Partnerships and Localities Service. Somerset Council funding for both elements will come from the Partnerships & Localities budget, with a £50k contribution to CA in 2024/25 from Public Health. The availability of funding noted in this paper has been confirmed.

Somerset Integrated Care Board will initially contribute £140k per year to support the VCFSE infrastructure contract alongside Somerset Council's core contribution (£250k) with other council service contributions to be confirmed. The contract will be framed to enable expansion of the service offer as additional resources which can be applied to these priorities are identified within Somerset Council and through third parties.

Core funding of £629k will be provided to Citizens Advice in 2024/25 followed by £600k in 2025/26 and 2026/27. The funding will be allocated:

2024/25 (£629k)	CAS £581,137; CAWS £47,863
2025/26 and 2026/27 (£600k)	CAS £552,137; CAWS £47,863

Implementation of these proposals does not represent any unfunded commitment of Somerset Council funding.

6.6. Value for Money and Impact

- It is estimated that local government contributes around £400m out of a total of £20bn (2%) of all grants to the VCFSE sector in the UK (source: '360 giving' 2021/22 figures).
- Whilst one of the smaller contributors overall, local government funding is often the means to levering in funding from larger grant makers, and is critical to supporting the core operating costs of VCFSE organisations that other funders are less likely to support.
- In terms of the leverage that council funding can unlock, in Somerset in 2022/23, 442 VCFSE organisations received a total of 630 grants from 20 different funders with a total value of £10,030,666 (source: '360 giving'). As a conservative estimate this represents between £2 and £5 external leverage for every £1 of council funding. Infrastructure support is key in maintaining VCFSE organisations' ability to maximise their income through grants and donations.
- The sector also provides value for money through the volunteering opportunities it facilitates fulfilling roles and providing services which otherwise would have to be undertaken by paid staff.
 - The economic value of volunteering provided by Somerset adults aged 16+ who engaged in formal volunteering (i.e. with a group, club or organisation) at least once a year for 3 hours (138,562 people) is **£6.68** million. The value of volunteering provided by adults aged 16+ who volunteer at least 3 hour per month (82,198 people) is **£47.55** million (in both cases using the 2022 national social value framework value of £16.07 per hour).
- Volunteering also contributes to the economy through skills and workforce development vital in moving disadvantaged people closer to the jobs

market, for equipping young people to take up paid employment and in supporting people to retain and change career.

- In assessing the impact of the sector, official data fails to account for spillover fiscal benefits associated with charitable and voluntary activity. For example each time a charity supports a homeless person into stable accommodation and employment, they can help reduce crime, raise tax revenues, and lower expenditure on public services in areas like health.
 - Estimates from the National Council of Voluntary Organisations (NCVO) suggests that each success creates between **£6,000** and **£22,000** of savings for the public sector. That means each £1 spent by charities on such activity is likely to generate more than £2 of spillover fiscal benefit (source: NCVO 2023 Civil Society Almanac)
- The Citizens Advice case study in para 12.2.1 highlights the value for money that the VCFSE delivers. The headline VFM/impact figure is a saving of **£9,247,444** to the public sector in Somerset as a consequence of CA's work.
- 40 new Somerset charities were registered in 2022/23. Of the 2150+ charities in the county, 73% operate on less than £100k income per year and 87% of the VCFSE sector's people are volunteers. Evidence from the National Association for Voluntary and Community Action demonstrates that small and medium sized charities, and volunteer-led community groups, are most likely to need support to remain active, sustainable and well governed.
- Spark engaged with over 650 groups, over 80 groups received funding advice and Somerset groups raised well over £850k in 2022/23 with Spark's support.
- The Spark-a-Change platform enabled 356 volunteer roles to be advertised and 572 new volunteers to be recruited into Somerset groups in 2022/23. Nearly 80 new organisations started using the platform to promote volunteering opportunities.

6.7. Citizens Advice

Funding for core service has predominantly been provided by Partnerships and Localities and Public Health. For 2023/24 **£647,109** of core (Early Help and Prevention) funding has been provided.

Adult Social Care separately provide Local Assistance Scheme funding which is passed on as grants to support clients with crisis / emergency interventions and to alleviate immediate needs. Citizens Advice retain a small proportion of the funds to cover management costs and a separate decision will be taken by Adult Social Care regarding this funding.

Through the housing services the Council's Community Services Directorate provides funding for specialist casework to support homelessness reduction and prevention and debt advice, and a separate decision will be progressed in relation to this funding.

The Council has previously provided one-off funding to support Covid-19 and cost of living responses. A full breakdown of the funding received from Somerset Council for 2023/24 can be found at **APPENDIX 3**.

The funding recommendation members are asked to support represents a reduction on that provided in 2023/24. An award of **£600,000** per annum in years two onwards will be a **7.4%** reduction whereas an award of **£629,000** in year one represents a reduction of **2.8%**.

The reduction in the proposed funding for 2024 to 2027 is principally because of the savings that Public Health are required to achieve.

- I. A grant of **£629,000** in year one will go some way to mitigate the effects of the negative impacts of the reduced funding of £600,000 in year two onwards as follows -
 - addressing the loss of the Adviceline capacity by doubling the volunteer adviser recruitment and training programme with a target of increasing active volunteers by an additional 24 per year (over and above natural turnover).
 - funding an intensive volunteer recruitment and training programme. This would enable the CA's to retain one Trainer /Supervisor who would run four training courses during 2024/25.
- II. Funding of **£600,000** from year two onwards will result in the following negative impacts.

a) Citizens Advice Somerset

- Down-size offices in Yeovil at the end of the current lease (September 2024) and move to smaller premises. This will reduce capacity for face-to-face work in Yeovil from the current 6 interview rooms (3 at Petters House and 3 at the Foyer) to 3 interview rooms at the Yeovil Foyer.
- Review other premises and look to make savings in relation to the offices in Shepton Mallet.
- Reduce the evening adviceline service from the current 3 evenings a week to retaining a service one evening a week. This will make salary savings on the staff and supervisors running this provision.
- Review the Community Access Points (CoAP) and scale back plans for a CoAP in each Local Community Network area. CA will reduce the number of CoAPs by concentrating provision on the areas of highest need.
- Reduce the number of paid advisers working on the Adviceline service by 1.4 FTE. This will reduce the capacity to help clients by 1,540 clients per year.

b) Citizens Advice West Somerset

- Reduction of 10 hours per week on Adviceline resulting in about 300 fewer clients a year being served.
- Reduce outreach sessions from six to four and reduce the number of dates to attend these services, resulting in approximately 100 clients fewer being seen.
- May need to consider reduced office hours which will exclude approximately 520 clients each year.

- Reduce the debt adviser service which could potentially increase the likelihood of evictions in an already struggling area, which carries its own cost to the Council.
- Increased disadvantage to rurally isolated and digitally excluded residents, with West Somerset having a higher proportion of this social group. It could be argued that they are potentially democratically isolated and excluded.

6.8. Audit Committee 29 June endorsed a new corporate risk (org0066) regarding the continued risk of financial instability of the sector exacerbated by the financial pressures on Somerset Council and the requirement to make savings. With the implementation of Dynamics and the establishment of new cost centres there is a need to ensure correct coding is being used to identify VCFSE expenditure.

Current risk	Likelihood	3	Impact	4	Risk Score	12
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Controlled risk	Likelihood	2	Impact	3	Risk Score	6
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Failure to implement the recommendations risks destabilising the VCFSE sector and poses reputational damage for the Council and undermines a key component of the authority’s approach to engaging and supporting vibrant communities. Uncertainty could impact on recruitment and retention with further impact on viability of VCFSE organisations and the quality of the services they deliver. It would also undermine positive working relationships with the VCFSE sector at a time when the Council has signalled through signing the MoU the importance of more joined up working and collaboration.

7. Legal Implications

- 7.1.** Legal services input will be required in drafting agreements with individual VCFSE organisations.
- 7.2.** Ongoing join up with Commercial and Procurement and commissioners is required to continue review, rationalisation and consolidation of grant and other funding agreements, and to ensure they align with other commissioning activity and priorities. Opportunities for joint commissioning are being explored with NHS Somerset ICB as part of integrated care system.

8. HR Implications

- 8.1.** There are no HR implications arising from this report.

9. Other Implications

9.1. Equalities Implications

It should be noted that a number of equality communities rely heavily on the support provided by the VCFSE partners which have filled the preventive support landscape, especially over the last 10-12 years. Should this support be reduced or removed, we will need to fully understand the impact on equality communities and the stability of the remaining VCFSE sector due to this reduction in funding. Local authority funding often plays a key role in levering in additional funding to the VCFSE sector. It also supports work that would not have funding available from anywhere else, but could have a substantial impact

on small and marginalised communities. Consideration of a sustainable long-term model of funding from the authority will help provide reassurance for the VCFSE sector.

A full Equality Impact Assessment for Citizens Advice has been completed and appended to this report (Appendix 2). This report's recommendations represent a reduction in funding compared with 2023/24, and will impact negatively on clients sharing Protected Characteristics. The overall impact of reduced funding is set out in section 6.4 of this report but by working with our CA's to identify potential mitigations a decision to fund at £629,000 per annum, as opposed to £600,000 will go some way to achieving that. A grant of £600,000 will result in the closure of some service elements and a reduced number of clients who can be assisted.

A full Equality Impact Assessment for the VCFSE support contract is appended to this report as Appendix 1. The infrastructure element of the contract is funded at the same level as 2022/23, and does not include an increase to reflect inflationary pressure and increased demand over the last four years. This will result in a reduction in the overall service capacity with some potential equality impact. The engagement model element of the contract is funded well below the initially proposed figure and will therefore not deliver the scale and scope of engagement and advocacy which the partners aimed for. There is a risk therefore that minority groups and the organisations which work with and support them, may be excluded from the engagement and advocacy support mechanisms. In developing the working arrangements, mitigation of the impact on equality groups and communities will be a priority.

9.2. Community Safety Implications

Crime rates are known to increase in an economic slowdown when people are exposed to unemployment, lower wage levels and are at a higher risk of falling into debt. The support that the voluntary sector, and in particular Citizens Advice services provides has a role to play in mitigating this. In addition, support through young people's charities can help provide diversionary activities and together with grassroots community groups and the wider sector help reduce social isolation and promote community cohesion.

9.3. Climate Change and Sustainability Implications

Somerset Council has declared both a Climate and Ecological Emergency. The VCFSE engagement model and Spark's wider support for the sector enables Somerset Council and other stakeholders to work in partnership with the VCFSE in progressing priority actions.

Effective support and funding for VCFSE organisations can enable them to secure and lever in additional external funding to support Somerset's communities and provide opportunities to contribute to a strong, diverse and sustainable local economy.

The proposals refer to Somerset-based charities which employ local staff and volunteers to deliver services close to the areas of need. Supply chains are short and generally local, and delivery of the services will not require additional staff travel.

The climate and sustainability implications arising from these proposals are therefore generally positive.

9.4. Health and Safety Implications

No implications have been identified.

9.5. Health and Wellbeing Implications

There is good evidence of the importance of working with partners across the VCFSE sector to address the wider determinants of health - the 'causes of the causes' – through supporting services and organisations which can address the conditions that cause people to become ill. These include social isolation, financial and housing issues, or the ability to live with a long-term health condition or disability. Without these services many more people would make significant demands on health and social care services, and would likely need care and support for longer.

In recent years the VCFSE sector has also performed a critical role in responding to the pandemic, supporting guests and hosts under the Homes for Ukraine scheme, responding to flooding and extreme weather events, and most recently in supporting residents during the cost-of-living crisis. Without a sustainably resourced VCFSE sector the resilience of Somerset to external and local events will be significantly curtailed. Spark is the VCFSE lead in the Somerset Emergency Volunteer Action Group and has played a key role in supporting the response to local crises.

The sector is recognised as an equal partner to the new Integrated Care System in Somerset, and will support the system with understanding and responding to population health needs at source, addressing potential rise in demand for health and social care services. To perform this role effectively it needs security of funding and a voice in strategic planning across the system.

It is well evidenced that many of the services and support people rely on are provided through community-based VCFSE organisations. Strengthening and securing support for these local groups and organisations enables them to focus on meeting the needs of their communities.

The health and wellbeing implications arising from these proposals are therefore positive.

9.6. Social Value

The VCFSE sector delivers innate social value through the charitable or not-for-private-profit basis of most organisations, providing insight and evidence on community needs, mobilising volunteers, supporting service users, providing local employment opportunities, training and skills development, often reaching further into 'hard to reach' and seldom heard groups and communities than public sector bodies can.

VCFSE organisations in Somerset are in the main small, employ local people and volunteers, and have short supply chains, which helps keep money in the local economy.

The social value implications of this proposal are therefore positive. There is scope for the authority to strengthen its approach to social value through consideration more broadly of corporate social responsibility and how as a Council it influences partners and other organisations operating in Somerset.

10. Scrutiny comments / recommendations

- 10.1.** The Chair of Corporate and Resources Scrutiny Committee has been consulted on the proposals in this paper. Noting that the work to review the Council's relationship with and support to the VCFSE is ongoing, the intention is to bring a paper to a future meeting of the Scrutiny Committee, to reflect on the full scope of the work currently being undertaken and the pivotal role of the sector in supporting Somerset's communities.

11. Background Papers

- Appendix 1 – Spark Somerset VCFSE support Equality Impact Assessment
- Appendix 2 – Citizens Advice Equality Impact Assessment
- Appendix 3 – Somerset Council Funding 2023/24
- Appendix 4 - Citizens Advice Somerset other funding sources 2023/24
- Appendix 4a - Citizens Advice West Somerset detailed breakdown of non-council funders 2023/24

12. Background

12.1. VCFSE Infrastructure support

- 12.1.1.** Individual voluntary, community and social enterprise (VCFSE) organisations and the sector collectively have long been valued partners to the public sector, and it is widely recognised that VCFSE organisations play an essential role in creating vibrant and inclusive communities, improving health and well-being, reducing inequality and supporting quality of life.
- 12.1.2.** Somerset system partners have a shared vision for a diverse, vibrant, sustainable and resilient VCFSE sector. The provision of support to voluntary groups is key in securing a strong VCFSE sector which supports and can help deliver Somerset Council's ambitions for the county and its residents.
- 12.1.3.** While the partnership and alignment of effort and ambition often relates to planned and funded service delivery, the value and role of the VCFSE sector is much wider and includes:
- Provision of support and services to people and communities, through paid staff and volunteers
 - Valuable insight gained through being rooted and engaged in communities.
 - Providing a mechanism for articulating and listening to stakeholder voices. VCFSE groups have a vital lobbying and campaigning role and can reach into communities to raise voices which the public sector may otherwise miss.
 - Ability to take a holistic, preventative, person-centred and place-based approach to supporting community health, wellbeing and quality of life.
 - Links across and within different communities of interest and experience
 - The ability to be flexible, adaptable and responsive
 - Expertise in meaningful impact measurement and joint design and development of services
- 12.1.4.** Infrastructure support enables individual VCFSE groups and organisations to develop, improve and sustain their services through the provision of training for staff and volunteers, advising on operational and governance policy and procedure, advising and assisting with funding applications and bid writing, and ensuring safeguarding responsibilities are met. The support also co-ordinates

the voice of, and advocates on behalf of, the VCFSE sector in its partnerships with the public sector and is key to the implementation of the engagement model with the VCFSE sector and ICB.

- 12.1.5.** Spark Somerset is the county's sole council for voluntary service (CVS) and the recognised countywide VCFSE infrastructure provider. Spark is a member of the National Association for Voluntary and Community Action (NAVCA), the national co-ordinating body for infrastructure organisations. Spark is also Somerset ICB's appointed strategic partner and the VCFSE sector's chosen lead support and advocacy body.
- 12.1.6.** The contract will draw together the resources previously awarded/granted to Spark by Somerset County Council and the four district councils alongside the NHS Somerset contribution. The specification and single contract will ensure consistency of service provision across the county, coherence in the arrangement and reduce the contract management, monitoring and reporting burden.
- 12.1.7.** The commission will be led by the Partnerships and Localities Service with Somerset Integrated Care Board initially contributing £140k per year alongside Somerset Council's core contribution (£250k) with other service contributions to be confirmed. The contract will be framed to enable expansion of the service offer as additional resources are identified which can be applied to these priorities.
- 12.1.8.** The contract will commence on 1st April 2024 for the:
- Provision of support to Voluntary, Community, Faith and Social Enterprise (VCFSE) organisations.
 - Delivery of the VCFSE engagement model in line with the Memorandum of Understanding signed with VCFSE and ICB in September 2023.
- The contract value will be up to £750k per annum, with an estimated total value of up to £3.55m. The contract duration will initially be three (3) years with the option to extend by a further two 12-month periods. The maximum contract duration is therefore five (5) years.

12.2. Citizens Advice

- 12.2.1.**
- a) Somerset's CAs are independent charities and part of the Citizens Advice network in England and Wales. They work in partnership with other agencies and groups.
 - b) Somerset's CAs are the only provider of universal advice services that are free, confidential, independent and impartial.
 - c) Advice services are quality assured under the national Citizens Advice Membership Scheme.
 - d) CA's goal is both to support residents with their immediate needs and specialist casework where required, and critically to enable and empower residents to take greater control over their lives.
 - e) CA provides advice on an extensive and often interrelated range of issues including benefits, debt, employment, consumer, housing and family relationships.
 - f) In the year August 2022 to July 2023 Somerset's CA served **21,289** unique clients with **92,957** issues.

- g) The top 5 issues that CA dealt with are -
- Benefits - **33,972**
 - Debt – **11,998**
 - Housing – **9,605**
 - Financial Services and capability – **7,079**
 - Family and relationships – **4,973**
- h) The benefits of the advice provided by CA for residents contribute significantly to positive health and wellbeing outcomes. Reference to a wide range of research, reports and data that demonstrate these benefits can be found in the Equality Impact Assessment at Appendix 1.
- i) In the 2022/23 financial year CA delivered **£6,845,567** of benefits realisation for its clients. This is additional income, a large proportion of which will be spent in the local economy.
- j) In addition to the direct benefits delivered for CA clients, CA delivered **£9,247,444** of savings to the public sector in the 2022/23 financial year. A detailed breakdown of these savings can be found at Appendix 2.
- k) Furthermore the fiscal benefit of their Debt Advice work was **£3,132,510** and in terms of **Return on Investment**, for every £1 invested in their service -
- **£3.46** in fiscal benefit was delivered (financial savings to local and national government due to fewer payments for out-of-work benefits, costly evictions, re-housing evicted tenants and less demand on the NHS).
 - **£26.46** in public value (when people have fewer problems they have higher levels of wellbeing, participation in society and productivity).
 - **£12.76** in value to the people helped (help individual clients to achieve financial outcomes like getting back-dated benefits, writing-off debts and securing refunds for consumer issues).
- l) CA provide a non-statutory but essential service and were the service not available this would likely result in a significant rise in the number of residents contacting the council both on issues of direct interest for the council to resolve (e.g. rent and council tax arrears), and also other issues which CA deal with but fall outside of the council's purview and for which there is no other appropriate service to make a referral. This would be at extra cost to itself.
- m) In the same way CA also assist the council recover income through assisting in the reclamation of arrears and debt.
- n) CA plays a key role in preventing escalation of demand on statutory services and/or enabling demand on statutory provision to be stepped down as appropriate by providing support and advice early on in people's lives.
- o) CA provide good value for money by way of their use of volunteers as compared with paid staff. In the 6 months October 2022 to March 2023 CA employed 19.8 FTE and deployed 105 volunteers; a ratio of 5.3 volunteers to paid staff. Whilst CA are currently updating how they capture the economic value of volunteering we know that in the first 6 months of 2022/23 the value was **£490,022**

12.3. Small Community Grants and Lotteries




- 12.3.1.** The scope of the cross-service working group includes a review of small community grants and lotteries that were run by some of the predecessor district councils. Both Mendip District Council and Somerset West and Taunton Council ran lotteries to generate income to support local good causes. These arrangements are currently being reviewed. This paper seeks delegations to consider and agree options for small grants and a steer will be sought regarding the future of the lotteries.

Report Sign-Off

	Officer Name	Date Completed
Legal & Governance Implications	David Clark	21/10/2023
Communications	Peter Elliott	24/10/2023
Finance & Procurement	Jason Vaughan / Nicola Hix	31/10/2023
Workforce	Alyn Jones	23/10/2023
Asset Management	Oliver Woodhams	19/10/23
Executive Director / Senior Manager	Alyn Jones	23/10/2023
Strategy & Performance	Sara Cretney	25/10/2023
Public Health	Lou Woolway	24/10/2023
Executive Lead Member	Councillor Theo Butt Philip	30/10/2023
Consulted:		
Local Division Members	Not applicable	
Opposition Spokesperson	Councillor Faye Purbrick	24/10/2023
Scrutiny Chair Corporate and Resources	Councillor Bob Filmer	30/10/2023

Somerset Equality Impact Assessment

Before completing this EIA please ensure you have read the EIA guidance notes – available from your Equality Officer or www.somerset.gov.uk/impactassessment

Organisation prepared for (mark as appropriate)	 Somerset Council	x	 NHS Somerset	 NHS Somerset NHS Foundation Trust
Version	V1		Date Completed	30 October 2023
Description of what is being impact assessed				
<p>Award of a contract for up to five years (3 +1 +1) to Spark Somerset to provide voluntary, community, faith and social enterprise (VCFSE) sector infrastructure support and engagement. The contract is jointly funded by Somerset Integrated Care Board (ICB) with Somerset Council as the lead commissioner and due to commence on 1st April 2024.</p> <p>Spark Somerset is Somerset’s council for voluntary service and recognised by the VCFSE sector as the single infrastructure provider. Spark is a member of the National Association for Voluntary and Community Action, the national co-ordinating body for infrastructure organisations.</p> <p>Infrastructure support enables individual VCFSE groups and organisations to develop, improve and sustain their services through the provision of training for staff and volunteers, advising on operational and governance policy and procedures, assisting with funding applications and bid writing, and ensuring safeguarding duties are met. The support also co-ordinates the voice of, and advocates on behalf of, the VCFSE sector in its partnerships with public sector and is key to the implementation of the engagement model with the VCFSE sector signed by Somerset Council and Somerset ICB in September 2023.</p> <p>Following vesting of the new unitary authority there are legacy agreements in place with many VCFSE sector organisations – including Spark - and the Council is committed to review and rationalise them in its first year of operation. Current arrangements for</p>				

delivery of VCFSE infrastructure support by Spark Somerset are disjointed, short term and not coherent. The new contract from April 2024 will bring existing arrangements and resources into a coherent whole and secure and embed the engagement model which underpins the Memorandum of Understanding which the Council recently signed alongside Somerset ICB.

The new contract will draw together the resources previously awarded/granted to Spark by Somerset County Council and the four district councils. A new specification – which reflects the post-pandemic VCFSE sector’s requirements - and single contract will ensure consistency of service provision across the county, coherence in the arrangement and reduce the contract management, monitoring and reporting burden.

Feedback from VCFSE groups and commissioners of support services suggest that many equality communities rely heavily on the support provided by VCFSE organisations which contribute to the preventive and support offer, adding significantly to the capacity and expertise which can be secured through direct public sector funding. These VCFSE organisations in turn – particularly the small and medium sized ones – rely on the support available from Spark to ensure they are compliant with legal and policy requirements, and are linked to, and able to benefit from, the wider sector and its development.

Should this support be reduced removed, we will need to properly understand the impact on equality communities and the stability of the remaining VCFSE sector caused by this reduction. Local authority funding plays a key role in levering in additional funding to the VCFSE sector. It also supports work that would not receive funding from anywhere else but can have a substantial impact on small communities and populations in the area.

A small number of VCFSE sector equality groups in Somerset rely on minimal funding to work with some of our most isolated and vulnerable communities. These are often communities that would not engage with generally delivered or Council-led services for a variety of reasons. A sustainable long-term model of sector-led support and funding from the local authority will help to provide reassurance for VCFSE groups and organisations, and continue to build positive relationships with the communities they serve.

The VCFSE is critical to the delivery of the Council Plan’s four ambitions. Working and collaborating with partners is a recurring theme in the Council Plan and the VCFSE is recognised as a key strategic partner in the shared aim of improving lives in Somerset. Alongside the new infrastructure support contract, Somerset Council is reviewing and rationalising its grants and other arrangements with VCFSE sector organisations.

The Memorandum of Understanding and the associated engagement model embed equity into the relationship between Somerset Council, Somerset NHS and the VCFSE sector, and provide an opportunity to consider collective expectations and requirements for equality and diversity across the system. When fully implemented the engagement model will deliver greater diversity of involvement in shaping services, identifying priorities and decision-making.

The award of the VCFSE infrastructure support contract has the potential to positively impact on protected groups through:

- Advancing equality of opportunity between those who share a protected characteristic and those who don't.
- Fostering good relations between those who share a protected characteristic and those who don't.

However, VCFSE organisations are affected by the same financial and cost pressures as households – and which drive more people to seek help from charities and voluntary groups - with inflation and cost increases eroding the value of grants and donations to charitable groups and causes. Few donations and grant agreements include scope for inflationary increases, reducing the real value of the funding.

While the new infrastructure contract is funded to the same total as the previous arrangements, the value of the funding is significantly reduced by inflation and the rising cost of goods, services and energy. The new arrangement will reduce the reporting and monitoring burden but will not secure the same level of service as was previously the case. The structure of the new service and deployment of staff and other resources must be carefully planned to maximise the benefit and mitigate the impact of reduced value.

Evidence

What data/information have you used to assess how this policy/service might impact on protected groups? Sources such as the [Office of National Statistics](#), [Somerset Intelligence Partnership](#), [Somerset's Joint Strategic Needs Analysis \(JSNA\)](#), Staff and/ or [area profiles](#), should be detailed here

Data and information to assess the impact of this new contract has been gathered from:

- 'State of the Sector' reports which detail the position and challenges facing the VCFSE sector
- The Reflect, Recover Renew [research report](#) and resulting working groups which are VCFSE sector-led and focus on positioning the sector for the future
- Feedback from 2023 market engagement activity which included face to face engagement with around 15 VCFSE organisations and a brief survey which garnered 99 responses.
- [Research produced by the Social Market Foundation](#) which underlines the VCFSE role in providing public services with reduced funding from the public sector.
- [Briefing from the Local Government Information Unit](#) which reflects on the essential partnerships between local government and charitable organisations in meeting the needs of disadvantaged communities and population groups

Who have you consulted with to assess possible impact on protected groups and what have they told you? If you have not consulted other people, please explain why?

This equality impact assessment has been developed by Partnerships and Localities officers who have worked with and managed funding agreements with VCFSE organisations and the sector as a whole over many years, and builds on the equality impact assessments produced to support those arrangements.

This assessment has also been informed by officers with Equality lead roles and commissioners responsible for services directly designed to meet the needs of populations with protected characteristics.

Analysis of impact on protected groups

The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. Consider how this policy/service will achieve these aims. In the table below, using the evidence outlined above and your own understanding, detail what considerations and potential impacts against each of the three aims of the Public Sector Equality Duty. Based on this information, make an assessment of the likely outcome, before you have implemented any mitigation.

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
Age	<p>Age-related work will be strengthened by the award of the new infrastructure contract:</p> <ul style="list-style-type: none"> The inclusion of the co-ordination of the Service Delivery Partnership brings together providers commissioned through the Council's Community Connect support programme. While the Community Connect programme is not solely targeted at older people it is recognised that many beneficiaries will be elderly and improved co-ordination of the offer across providers will have a positive impact. 	□	□	☒

	<ul style="list-style-type: none"> • Spark hosts and supports the Somerset Youth Work Alliance, and while the operational elements are separately-funded, the infrastructure contract secures Spark's core work and enables it to lead the Alliance. • The Youth Work Alliance was developed with dedicated youth work organisations. With the external funding the Alliance will expand its support and enable a broader range of VCFSE groups to engage in and benefit from its activity. This will improve the quality and coherence of the youth offer available through organisations generally focussed on environmental issues and all-age volunteering. 			
Disability	<p>Disability-related work will be strengthened by the award of the new infrastructure contract:</p> <ul style="list-style-type: none"> • The inclusion of the co-ordination of the Service Delivery Partnership brings together providers commissioned through the Council's Community Connect support programme. While the Community Connect programme is not solely targeted at this protected characteristic, it is recognised that many beneficiaries will have a disability or long term condition, and improved co-ordination of the offer across providers will have a positive impact. 	□	□	☒
Gender reassignment	<ul style="list-style-type: none"> • Consideration has been made of the impacts on this protected characteristic and no disproportionate impact has been identified. 	□	☒	□
Marriage and civil partnership	<ul style="list-style-type: none"> • Consideration has been made of the impacts on this protected characteristic and no disproportionate impact has been identified. 	□	☒	□

Pregnancy and maternity	<ul style="list-style-type: none"> Consideration has been made of the impacts on this protected characteristic and no disproportionate impact has been identified. 	□	⊗	□
Race and ethnicity	<ul style="list-style-type: none"> Other organisations which are directly funded to work with and support race communities are involved in the sector's development with this work led by Spark. The Memorandum of Understanding provides opportunity to improve coherence of the overall support offer and narrow the gaps between organisations supporting race communities. Implementation of the MoU is led by Spark and funded through this contract. Through these arms-length developments, the offer to race communities will be improved, providing a positive impact. 	□	⊗	□
Religion or belief	<ul style="list-style-type: none"> Other organisations which are directly funded to work with and support faith communities are involved in the sector's development with this work led by Spark. The Memorandum of Understanding provides opportunity to improve coherence of the overall support offer and narrow the gaps between organisations supporting faith communities. Implementation of the MoU is led by Spark and funded through this contract. Through these arms-length developments, the offer to faith communities will be improved, providing a positive impact. 	□	⊗	□
Sex	<ul style="list-style-type: none"> Consideration has been made of the impacts on this protected characteristic and no disproportionate impact has been identified. 	□	□	□

Sexual orientation	<ul style="list-style-type: none"> • Other organisations which are directly funded to work with and support LGBTQ+ communities are involved in the sector's development with this work led by Spark. • The Memorandum of Understanding provides opportunity to improve coherence of the overall support offer and narrow the gaps between organisations supporting LGBTQ+ communities. Implementation of the MoU is led by Spark and funded through this contract. • Through these arms-length developments, the offer to LGBTQ+ communities will be improved, providing a positive impact. 	□	□	☒
Armed Forces (including serving personnel, families and veterans)	<ul style="list-style-type: none"> • Established armed forces and service charities are increasingly engaging with 'mainstream' VCFSE groups to broaden the support available to armed forces communities, and much of this engagement is through Spark-supported networks. 	□	□	☒
Other, e.g. carers, low income, rurality/isolation, etc.	<p>Carer-related work will be strengthened by the award of the new infrastructure contract:</p> <ul style="list-style-type: none"> • The inclusion of the co-ordination of the Service Delivery Partnership brings together providers commissioned through the Council's Community Connect support programme. While the overall Community Connect programme is not solely targeted at this protected characteristic, an element of it is. Improved co-ordination of the offer to carers across providers (including the separately commissioned young carers' service) and the wider VCFSE sector will have a positive impact. 	□	□	☒




Negative outcomes action plan				
Where you have ascertained that there will potentially be negative outcomes, you are required to mitigate the impact of these. Please detail below the actions that you intend to take.				
Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
Arrangements to be implemented to ensure improvement in coherence of support for race communities. Will require Spark to work closely with groups funded to support race communities, and those groups to actively engage with wider sector developments and support Spark can provide.	Ongoing	P&L Commissioner	Monitoring and reporting Wider sector feedback	<input type="checkbox"/>
Arrangements to be implemented to ensure improvement in coherence of support for faith communities. Will require Spark to work closely with groups funded to support race communities, and those groups to actively engage with wider sector developments and support Spark can provide.	Ongoing	P&L commissioner	Monitoring and reporting Wider sector feedback	<input type="checkbox"/>
Arrangements to be implemented to ensure improvement in coherence of support for carers and their families. Will require Spark to work closely with groups funded to support carers, and those groups to actively engage with wider sector developments and support Spark can provide.	Ongoing	P&L commissioner	Monitoring and reporting Wider sector feedback	<input type="checkbox"/>
If negative impacts remain, please provide an explanation below.				

Completed by:	Jeff Brown
Date	30/10/2023
Signed off by:	Chris Phillips
Date	30/10/23
Equality Lead sign off name:	Angela Farmer
Equality Lead sign off date:	30/10/2023
To be reviewed by: (officer name)	Jeff Brown
Review date:	01/04/2023

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APPENDIX 2 Somerset Equality Impact Assessment

Before completing this EIA please ensure you have read the EIA guidance notes – available from your Equality Officer or www.somerset.gov.uk/impactassessment

Organisation prepared for (mark as appropriate)	 Somerset Council		 NHS Somerset		 NHS Somerset NHS Foundation Trust	
Version	1.0		Date Completed	October 2023		
Description of what is being impact assessed						
<p>The impact of failing to fund the core costs of citizens advice services in Somerset at the level proposed in the Key Decision report.</p> <p>The precise impacts would be dependent on the level of any cuts below the level of the report’s recommendations, which could range from a small reduction in service, to significantly reduced, right through to closure.</p> <p>Citizen Advice services make a significant contribution to individuals and communities providing a universal, free, confidential and impartial information and advice service to everybody regardless of race, gender, age, religion, sexuality or disability. Without this service many people would not have an alternative. It is local and holistic, often supporting on more than one issue at a time which is known to be a common factor with people with problems such as depression.</p> <p>CA help to address negative effects of social issues such as debt that impacts on both emotional and physical aspects of health and helps to address health inequalities through this process. This investment recognises the impact of social determinants on health and health outcomes.</p> <p>Emerging evidence on the economic and social impact of the coronavirus (COVID-19) pandemic shows that young people aged 12–24 years are one of the worst-affected groups, particularly in terms of the labour market and mental health outcomes (The Health Foundation). Young adulthood is a crucial time to build the foundations for a healthy adulthood. Making a successful transition to adulthood depends in large part on access to good-quality work, housing and strong relationships. However, to secure these, young people need financial, practical and emotional support, along with skills and the right connections. Typically, advice</p>						

services are aimed at adults in both the modes of delivery and promotion.

The impact of Covid-19 and the cost-of-living crisis has reinforced the importance of ensuring appropriate advice services are in place. An important aspect of CA community service is the provision of general advice (covering a wide range of topics) that is easily accessed by phone, email or in person. It is vital that everyone can engage with help when they need it because if people's problems are not resolved their health, well-being and finances suffer. What is especially important about this service is the fact that CA offer immediate assistance when needed and follow-on specialist help for those with complex problems including financial distress. Often clients present in the general advice service with several interlinked problems (employment dispute leading to loss of income causing rent arrears)

Through the support provided by Citizens Advice the following benefits are able to be realised:

- Household incomes increase because people can access their full entitlements and are better able to tackle debts.
 - The bulk of this increased income is then spent locally.
- People are enabled to better manage their resources in the future with less risk of debt or financial hardship.
- More people keep their jobs or find new ones, so they can contribute to the local economy.
- Individuals and families are supported from evictions and are in more stable, affordable, sustainable housing arrangements.
- More residents have lower fuel tariffs and live in a more energy-efficient home with less risk of falling into fuel poverty.
- People have better understanding of financial services, consumer and legal matters.
- The most vulnerable will get help in an immediate crisis.
- Stigma is minimised by the holistic/generalist nature of the advice given and the impartial way it is delivered.

<https://citizensadvice Somerset.org.uk/>

Evidence

What data/information have you used to assess how this policy/service might impact on protected groups? Sources such as the [Office of National Statistics](#), [Somerset Intelligence Partnership](#), [Somerset's Joint Strategic Needs Analysis \(JSNA\)](#), Staff and/ or [area profiles](#), should be detailed here

The key evidence that has been used in this EIA is that provided by CAS and CAWS which is available in an interactive report that has been created in partnership with National Citizens Advice and draws on extensive data capture about all aspects of CA's work. The equalities specific data as it applies to clients from Protected Characteristics can be seen in the two tables below.

There are also a wide number of data sets, research studies and reports that speak of the benefits of CA services and their

contribution to health and wellbeing and tackling the wider social determinants of poor health (e.g. poor housing, low incomes) as well as their role during the Covid-19 pandemic and current cost of living crisis.

- No Health Without Mental Health - Delivering better mental health outcomes for people of all ages - <https://www.gov.uk/government/publications/no-health-without-mental-health-a-cross-government-outcomes-strategy>
- Mental health and prevention: taking local action for better mental health, Mental Health Foundation 2016 <https://www.mentalhealth.org.uk/sites/default/files/mental-health-and-prevention-taking-local-action-for-better-mental-health-july-2016.pdf>
- Better Mental Health For All: A public health approach to mental health improvement, Faculty of Public Health/Mental Health Foundation 2016 <https://www.mentalhealth.org.uk/sites/default/files/Better%20MH%20for%20all%20web.pdf>
- Health Policy Monitor – Recent developments in health inequalities policy http://hpm.org/en/Surveys/LSEUK/13/Recent_developments_in_health_inequalities_policy.html
- Five Year Forward View for Mental Health <https://www.england.nhs.uk/wp-content/uploads/2016/02/Mental-Health-Taskforce-FYFV-final.pdf>
- Somerset Mental Health Needs Assessment <http://www.somersetintelligence.org.uk/files/Mental%20Health%20Needs%20Assessment%202023.pdf>
- Covid19 and mental health - Provided insights into how the pandemic and the response to it, has impacting some people and communities more significantly than others and recommended activities and approaches needed to address these inequalities. [COVID-19 mental health and wellbeing recovery action plan - GOV.UK \(www.gov.uk\).](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/544447/COVID-19_mental_health_and_wellbeing_recovery_action_plan_-_GOV.UK.pdf)
- Build Back Fairer: The COVID-19 Marmot Review | The Health Foundation
- Joint Strategic Needs Assessment and Somerset Intelligence – <http://www.somersetintelligence.org.uk/jsna>
- National Citizens Advice Impact and cost of living reports <https://www.citizensadvice.org.uk/impact/>

A CAS/CAWS review into the advice needs of young people has highlighted the key areas that need attention:

- employment: mistreatment under zero hours contracts (which are more prevalent in younger employees); employers paying cash wages but failing to make NI contributions; employers failing to make workplaces Covid safe; young people being made or redundant or hours being reduced without due process.
- housing: homeless applications and appeals (following estrangement, relationship breakdown, or Leaving Care); budgeting advice regarding the costs of independent living.
- benefits: lack of income from losing a job or having hours reduced; moving into own home and having rent to pay; young carers asking questions on the other person's behalf (often about disability benefits which can be complex).

CAS/CAWS also reports -

- Noticeable changes for clients with increasing numbers of people living on very low incomes (under £999 a month) and needing help with money problems, rent arrears and benefit claims, with people struggling to afford their heating and food bills.
- Clients increasingly present with complex, interrelated problems that

National Citizens Advice forecast of changes in clients' advice needs due to cost of living crisis identifies that 1 in 4 people are not going to be able to pay their energy bills.

- The National Citizens Advice public website (www.citizensadvice.org.uk) page views demonstrate a very steep increase in visits to the Personal Independence Payments (PiP) pages and access to advice for those affected by the Cost-of-Living Crisis.

CA Users from Protected Characteristics

CA collect data on sex; disability/long term health, age, marital status and ethnicity.

The data presented below comprises that from the local authority funded core service as compared with that for all services (core plus separately funded projects) from the 2022-2023 financial year.

The statistics are compiled from clients who provided the required information so that a client profile could be produced. Clients whose details are not recorded or prefer not to say etc. are excluded.

Profile information is only collected where advice is provided, so the figures do not include the 3,784 clients assisted with 'Simple Queries'.

	Core		All services	
	No	%'age	No	%'age
Total of unique clients	13,960	100%	21,408	100%
Total No of issues	49,705	100%	82,174	100%
SEX				
Male	5,039	40%	7,072	41%
Female	7,417	59%	10,120	59%
RACE				
Black Asian	133	1%	172	1%
Black African/Caribbean	69	1%	94	1%
Black Other	20	0%	64	0%
Mixed	84	0%	135	1%
Gypsy/Irish Traveller	13	0%	48	0%
Other - Any Other	73	1%	82	1%
White	7,659	93%	10,282	94%
DISABILITY/LONG TERM HEALTH				
Disabled	756	9%	1,203	10%
Long-Term Health Condition	4,090	49%	6,305	52%
MARRIAGE/CIVIL PARTNERSHIP				
Married/Cohabiting/Civil Partnership	1952	35%	3,106	39%
AGE				
15-24 years	667	5%	857	4%
25-49 years	6,115	45%	7,743	37%
50-64 years	3,708	28%	6,820	33%
65-104 years	2,804	22%	5,261	26%

Issues

The following data shows the top 2 issues that clients with protected Characteristics are advised on.

	Core Service		All Services	
	Top 2 advice issues	%'age of all issues	Top 2 advice issues	%'age of all issues
SEX				
Male	Benefits Housing	37.7% 13.1%	Benefits Debt	43.6% 13.8%
Female	Benefits Housing	37.8% 12.6%	Benefits Debt	40.8% 15.4%
RACE				
Black Asian	Benefits Housing	20.5% 15.8%	Benefits Debt	23.4% 15%
Black African/Caribbean	Benefits Housing	21.6% 20.3%	Benefits Housing	23.8% 14.9%
Black Other	Employment Benefits	37.9% 20.7%	Benefits Employment	34.6% 21.1%
Mixed	Benefits Housing	29.2% 18.3%	Benefits Housing	27.8% 19.9%
Gypsy/Irish Traveller	Benefits Debt	44.3% 22.9%	Benefits Debt	43.3% 24.4%
Other	Benefits Housing	27.4% 12.6%	Benefits Housing	41.8% 10.8%
DISABILITY/LONG TERM HEALTH				
Disabled	Benefits Housing	44.1% 10.6%	Benefits Debt	52.5% 10.7%
Long-Term Health Condition	Benefits Debt	47.1% 11.9%	Benefits Debt	50.5% 17.5%
MARRIAGE/CIVIL PARTNERSHIP				
Married/Cohabiting/Civil Partnership	Benefits Housing	41% 11.4%	Benefits Debt	51% 14.7%

AGE				
15-24 years	Benefits Housing	26.8% 19.7%	Benefits Housing	1.15% 0.8%
25-49 years	Benefits Housing	30.1% 15.3%	Benefits Debt	12.6% 7.8%
50-64 years	Benefits Housing	44.9% 10.5%	Benefits Financial Services	13.8% 4.1%
65-104 years	Benefits Housing	48.4% 10.5%	Benefits Financial Services	17.1% 2.5%

Financial benefits of the work of Citizens Advice to Somerset residents, Somerset's economy and Somerset Council and the wider public sector

Public Sector

Councils

In 2022/23 Somerset's Local Citizens' Advice reduced costs to the council as follows:

- Reduced cost of mental health interventions - **£93,307**
- Preventing housing evictions inc. reduced costs of legal proceedings and repair of property - **£269,157**
- Statutory homelessness, reduced cost of temporary housing - **£441,902**
- Council tax Arrears repayments scheduled - **£108,106**

A total of **£912,472**

- They also saved all housing providers, of which the council is one, **£2,341,666** by preventing housing evictions.

Across the wider public sector system

- the NHS was saved **£1,362,777** by reducing use of health services and an additional **£272,167** by helping to keep people in work.
- the Department of Work and Pensions **£4,263,948** of savings by helping to keep people in work and
- the Criminal Justice System **£94,414**

This represents a grand total of **£9,247,444** of savings to the public sector.

Debt

- The fiscal benefit of their Debt Advice work was **£3,132,510**

Return on Investment

- For every **£1** invested in their service
 - **£3.46** in fiscal benefit was delivered (financial savings to local and national Government due to fewer payments for out-of-work benefits, costly evictions, re-housing evicted tenants and less demand on the NHS (National Health Service)).
 - **£26.46** in public value (when people have fewer problems they have higher levels of wellbeing, participation in society and productivity).
 - **£12.76** in value to the people helped (help individual clients to achieve financial outcomes like getting back-dated benefits, writing-off debts and refunds for consumer issues).

Who have you consulted with to assess possible impact on protected groups and what have they told you? If you have not consulted other people, please explain why?

This equality impact assessment has been developed by a Partnerships and Localities VCFSE working group comprising officers who have worked with and contract managed funding agreements with their respective LCA's over many years and builds on previous equality impact assessments. It has also been informed by detailed and up to date CA data regarding service users from the Protected Characteristics, and the top advice issues they seek help with.

Analysis of impact on protected groups

The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. Consider how this policy/service will achieve these aims. In the table below, using the evidence outlined above and your own understanding, detail what considerations and potential impacts against each of the three aims of the Public Sector Equality Duty. Based on this information, make an assessment of the likely outcome, before you have implemented any mitigation.

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
Age	<ul style="list-style-type: none"> The provided CA data shows that Older People are a significant demographic of CA services with those aged 50 years and above representing 50% of the users of core services and 59% of users of all services. As Somerset has an aging demographic the proportion of older people using CA services is therefore likely to increase. With benefits and financial services being the top 2 issues older people seek help with any reduction in service bought about by reduced service will have a direct impact on older people's income and a likely increase in other issues such as debt and fuel poverty as a direct consequence. Any significant reduction in the level of annual funding proposed, resulting in a reduced level of service, would result in a negative impact on users of all ages but with a significant impact on older people aged 50 plus. Any reduction in the level of CA services as a consequence of a reduced award would impact on the number of older people that could be assisted; a retrograde step at a time when the older people population is growing, and we know that whilst living longer the quality of life in later years worsens. Reduced access to CA services could lead to reduced incomes, unresolved housing issues, increased debt and fuel poverty for some of the county's most vulnerable residents (see section 16i in the key decision report). A reduction in the level of funding could result in significant unmet needs with a greater call on, and recourse to, council resources at a direct cost to the council. Reduced access to CA services could lead to reduced incomes, unresolved housing issues, increased debt and fuel poverty for some of the county's most vulnerable residents (see section 16i in the key decision report). If the council is required to put in place complementary or replacement services to pick up the advice 	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	<p>needs that can no longer be met by CA this is likely to be at higher cost than the CA can provide due to the efficiencies generated through the utilisation of volunteer advice workers.</p>			
<p>Disability</p>	<ul style="list-style-type: none"> • National data (POPPI and PANSI) demonstrates that in addition to an increasingly ageing population the number of people aged 16 plus who will have physical or learning disabilities or mental health and care needs will also increase. • With the number of CA clients (all services) having a disability or long-term health issue already being 62%, then any significant reduction in funding could result in increasing number of people with this protected characteristic being unable to access support resulting in a greater call on, and recourse to, council resources at a direct cost to the council. • Disabled people experience considerably higher levels of health inequality than the general population; this is often exacerbated by low income. • The steep increase in seeking advice for PIP is evidence that the Cost-of-Living Crisis is really affecting disabled people and Cost of Living issues are now the biggest issues for disabled people using Citizens Advice compared with two years ago. • The extra costs of disability are linked to higher energy use and therefore a disproportionately increased impact (e.g. dialysis, oxygen and equipment at home). • Reduced access to CA services could lead to reduced incomes, unresolved housing issues, increased debt and fuel poverty for some of the county's most vulnerable residents (see section 16i in the key decision report). • If the council is required to put in place complementary or replacement services to pick up the advice needs that can no longer be met by CA this is likely to be at higher cost than the CA can provide due to the efficiencies generated through the utilisation of volunteer advice workers and the existing national CA 	<p>☒</p>	<p>☐</p>	<p>☐</p>

	infrastructure.			
Gender reassignment	<ul style="list-style-type: none"> No specific impacts identified - Citizens Advice give free, confidential information and advice to everybody regardless of Protected Characteristic. 	□	⊗	□
Marriage and civil partnership	<ul style="list-style-type: none"> No specific impacts identified - Citizens Advice give free, confidential information and advice to everybody regardless of Protected Characteristic. 	□	⊗	□
Pregnancy and maternity	<ul style="list-style-type: none"> No specific impacts identified - Citizens Advice give free, confidential information and advice to everybody regardless of Protected Characteristic. 	□	⊗	□
Race and ethnicity	<ul style="list-style-type: none"> Whilst users of CA services represent around 3% of all CA users this is fully in line with the percentage of ethnic minorities that make up the total population in Somerset. To this end any significant reduction in core funding would therefore have a negative impact on this section of the community as a result of a reduced service resulting in fewer people who would be able to access the service. Where race equality is combined with other protected characteristics (for example age, low income or disability) the impacts multiply. In the year to the end of July 2023, CA dealt with 973 immigration related issues; issues which will be specific to people from ethnic minorities. Reduced access to CA services could lead to reduced incomes, unresolved housing issues, increased debt and fuel poverty for some of the county's most vulnerable residents (see section 16i in the key decision report). If the council is required to put in place complementary or 	⊗	□	□

	<p>replacement services to pick up the advice needs that can no longer be met by CA this is likely to be at higher cost than the CA can provide due to the efficiencies generated through the utilisation of volunteer advice workers and the existing national CA infrastructure.</p>			
Religion or belief	<ul style="list-style-type: none"> No specific impacts identified - Citizens Advice give free, confidential information and advice to everybody regardless of Protected Characteristic. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sex	<ul style="list-style-type: none"> Women are proportionately the larger group of CA users at 59% of all users, although as a universal service it is accessible to and used by both men and women. All men and women would therefore be negatively impacted by any reduction in service. If the council is required to put in place complementary or replacement services to pick up the advice needs that can no longer be met by CA this is likely to be at higher cost than the CA can provide due to the efficiencies generated through the utilisation of volunteer advice workers and the existing national CA infrastructure. 	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sexual orientation	<ul style="list-style-type: none"> No specific impacts identified - Citizens Advice give free, confidential information and advice to everybody regardless of Protected Characteristic. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Armed Forces (including serving personnel, families and veterans)	<ul style="list-style-type: none"> Somerset has a sizable population of service and ex-service personnel (conservative estimate of 43,200) and their families whose particular needs are well recognised in the Military Covenant. Whilst CA doesn't currently collect user data based on armed forces status (serving or veteran) it is likely that a significant number of veterans will be amongst their users, particularly as 	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	<p>specialist armed forces charities (e.g. British Legion and SSAFA) refer clients to CA.</p> <ul style="list-style-type: none"> Any significant reduction in core funding would therefore have a negative impact on this section of the community as a result of a reduced service resulting in fewer people who would be able to access the service. Reduced access to CA services could lead to reduced incomes, unresolved housing issues, increased debt and fuel poverty for some of the county's most vulnerable residents (see section 16i in the key decision report). If the council is required to put in place complementary or replacement services to pick up the advice needs that can no longer be met by CA this is likely to be at higher cost than the CA can provide due to the efficiencies generated through the utilisation of volunteer advice workers and the existing national CA infrastructure. 			
<p>Other, e.g. carers, low income, rurality/isolation, etc.</p>	<ul style="list-style-type: none"> Impact on the challenges of rurality and isolationism. Support to rural communities to maintain/provide needed local services, for whom access to services may be difficult. Carers have known health needs and benefit enormously from being able to take time out to maintain their own health and wellbeing. Health outcome is closely associated with income inequality and financial exclusion. Taking positive action to support low-income groups or homeless to participate community activities and / or to engage in activities which might support their education or employment opportunities are all likely to have extremely positive health benefits. Pre pandemic the highest housing issue that our clients experienced was being threatened with homelessness. Since the cost-of-living crisis across the Citizens Advice Network the highest demand for housing advice is now from people who are experiencing actual homelessness or seeking advice on making 	<p>☒</p>	<p>☐</p>	<p>☐</p>

	<p>applications to local homelessness services.</p> <ul style="list-style-type: none"> • Pre-pandemic the most common debt advice among Citizens Advice clients was Council Tax and Rent Arrears. Energy debt is now the biggest debt advice need and the amount of debt per client has increased considerably. • Access to the internet can be a challenge for some groups in rural areas, particularly in West Somerset, and so other more traditional mechanisms to ensure awareness may need to be put in place. • Reduced access to CA services could lead to reduced incomes, unresolved housing issues, increased debt and fuel poverty for some of the county's most vulnerable residents (see section 16i in the key decision report). 			
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Negative outcomes action plan

Where you have ascertained that there will potentially be negative outcomes, you are required to mitigate the impact of these. Please detail below the actions that you intend to take.

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
The negative impacts identified above will go some way to being mitigated if elected members support the recommendation to core fund Citizens Advice Somerset and Citizens Advice West Somerset at the level of £629,000 per annum, and for the proposed period.	08/11/2023	Executive Members	Outcome of key decision report	<input type="checkbox"/>
If members choose to either significantly reduce the level of funding below that requested, or the period for which CA will be funded they will need to instruct officers from Partnerships and Localities to conduct a detailed appraisal of the likely impacts to the service based on the suggested level/s of funding. A final member decision would therefore need to be take place following submission of a further report.	08/11/2023	Executive Members Sara Skirton	Outcome of key decision report followed by detailed cost appraisal.	<input type="checkbox"/>
If a decision is made not to provide a sustainable level of annual funding for 3 years as proposed, resulting in the	08/11/2023	Executive Members	Partnerships and Localities	<input type="checkbox"/>

closure of CAS and CAWS, the only realistic mitigation will require the council to consider possible options to provide an alternative service including the possibly of delivering in-house.			to monitor actions agreed by Executive	
	Select date			<input type="checkbox"/>
	Select date			<input type="checkbox"/>

If negative impacts remain, please provide an explanation below.

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Completed by:	David Crisfield - Communities Specialist Partnerships and Localities
Date	16/10/2023
Signed off by:	Chris Phillips – Public Health Strategic Manager Commissioning
Date	12/10/2023
Equality Lead sign off name:	Angela Farmer
Equality Lead sign off date:	19/10/23
To be reviewed by: (officer name)	Sara Skirton, Service Director Partnerships and Localities
Review date:	November 2023

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APPENDIX 3

Funding Awarded 2023/24 (received) from Somerset Council (Figures include Citizens Advice West Somerset)

Prepared using LCAs' June 2023 data - Total current income: £1,305,040

Early Help & Prevention (Core funding) <ul style="list-style-type: none"> • Self Help • Some Help (one off advice) 	Advice at a Critical Time <ul style="list-style-type: none"> • Specialist In-depth Advice & Casework (SC funded programmes only - homelessness prevention / housing revenue) 	Tackling Disadvantage and Inequality <ul style="list-style-type: none"> • Specialist Teams/Casework
<p>CASS: £162,066 CAS: £181,387 CAM: £140,564 CAT: £111,292 CAWS: £51,800</p> <p>Total: £647,109</p>	<p>CASS: £36,285 CAS: £80,000 CAM: £46,466 CAT: £32,000 CAT & CAWS £8,178</p> <p>Total: £202,929</p>	<p>CAT £15,000 Young CA Somerset Additional Capacity £200,000 Somerset Cost Of Living Crisis R.T. £198,995 LAS (admin) £41,007</p> <p>Total: £455,002</p>

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Citizens Advice Somerset Funding Sources 2023/24 Amalagamted to include West Somerset (These figures are based on available data and may vary as the year progresses)

Page 1 Overall comparison of income from Somerset Council and External funders
 Page 2 Comparison of Categories of Services Funded (Early Help & Prevention, Advice at a Critical Time, Tackling Disadvantage/Poverty)
 Page 3 Sources of External Funding (eg Health, Family Welfare, Financial Disadvantage etc)
 Page 4 Breakdown of External Funders 2023/24

Overall breakdown of Somerset Council and External Funding for Citizens Advice Somerset 2023/24



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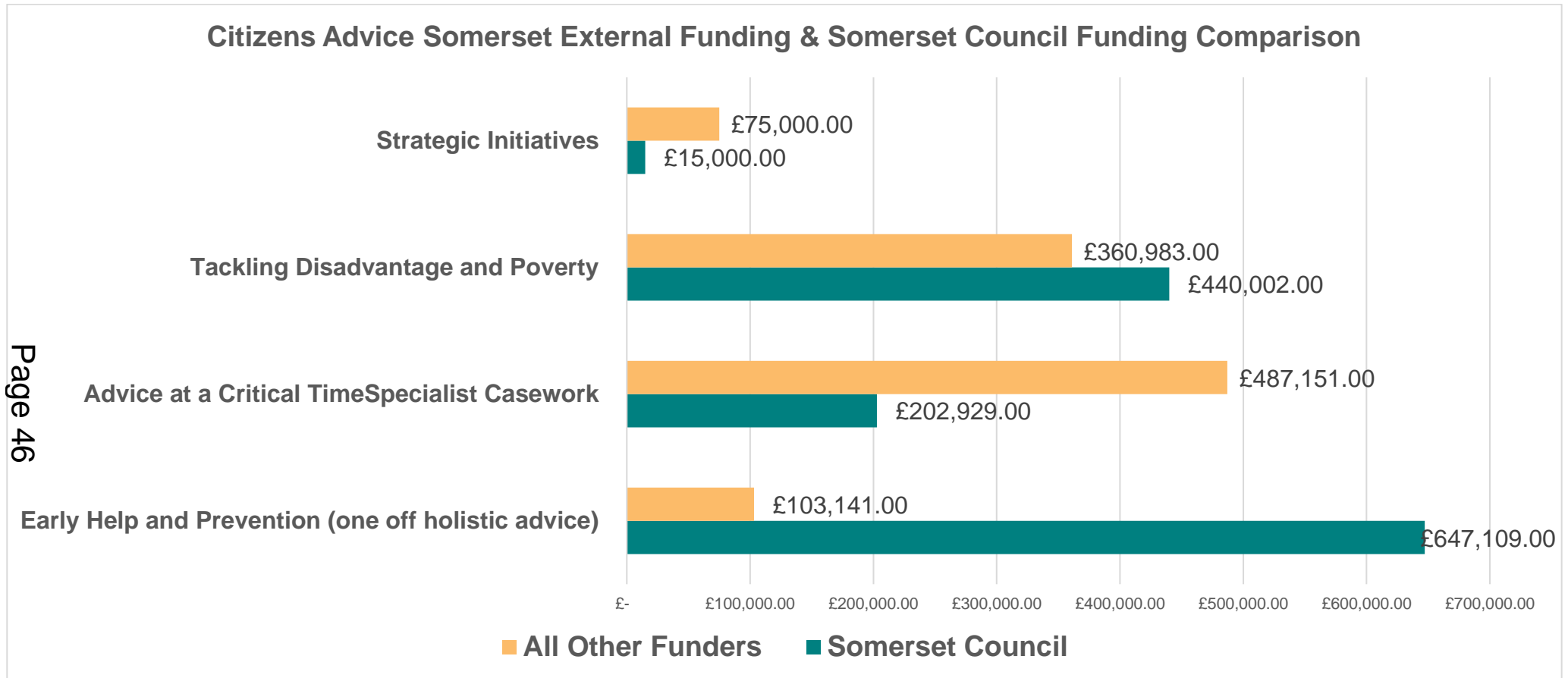


For every £1 from Somerset Council we generate a further **78p** in funding from other external sources. This is an additional outcome for Somerset and is over and above the direct benefits to individual clients (income gains, homelessness prevented, debts managed).



External funders are most likely to fund services offering advice at a critical time. This is because these programmes address specific disadvantage that can be matched to funders' priorities. External funders will not fund an open access programme (eg Early Help and Prevention) because the clients will have varied profiles and many will fall outside the funders' priorities.

Comparison of Categories of Services and Funding Sources for Citizens Advice Somerset 2023/24

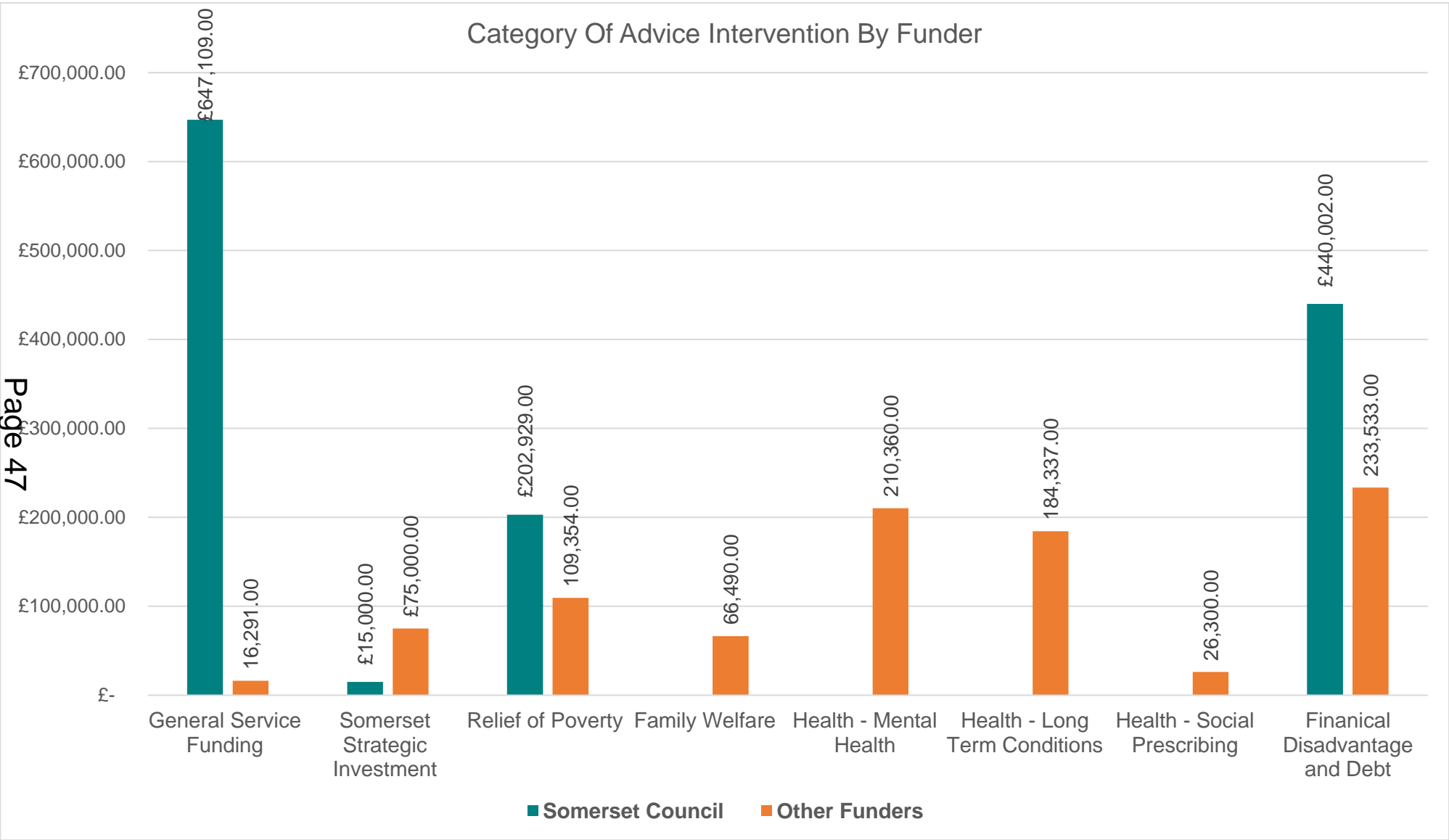


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In times of public concern (Pandemic, Cost of Living Crisis) Citizens Advice will attract short term financial support to meet increased need. This has been the case in the last 3 years with a reasonably equal proportion of additional funding secured from external funders and Somerset Council. In order to attract the additional investment it is vital that Citizens Advice has a secure financial footing and the main grant from Somerset Council provides that vital stability.

Comparison of the External Funding Sources Alongside Somerset Council Funding



A Breakdown Of External Funding Sources Citizens Advice Somerset 2023/24

		Early Help and Prevention (one off holistic advice)	Advice at a Critical Time Specialist Casework	Tackling Disadvantage and Poverty	Strategic Initiatives
General Service Funding	Somerset Council	647,109.00	202,929.00	440,002.00	15,000.00
Somerset Strategic Investment	Somerset CCG/ICB				75,000.00
Relief of Poverty	Trussell Trust Sedgemoor		44,288.00		
Relief of Poverty	Foodbank Taunton		5,066.00		
Relief of Poverty	National Cit A Sedgemoor	15,000.00			
Relief of Poverty	National Cit A South Somerset	15,000.00			
Relief of Poverty	National Cit A Mendip	15,000.00			
Relief of Poverty	National Cit A Taunton	15,000.00			
General Service Funding	Town & Parish Sedgemoor	6,000.00			
General Service Funding	Town & Parish South Somerset	2,000.00			
Other including bank interest	Other donations & bank interest	8,291.00			
Family Welfare	Henry Smith Trust Taunton			66,490.00	
Genalath Health	Elysium & Cygnet Health (Acute Services)		8,500.00		
Mental Health	Open Mental Health		201,860.00		
Health Social Prescribing	Mendip Health Connectors		26,300.00		
Health	Macmillan Cancer Support South Som		111,734.00		
Health	Macmillan Cancer Support Taunton		64,983.00		
Health	MS Society		7,620.00		
Finanical Disadvantage	Wessex Water Sedgemoor	5,400.00			
Finanical Disadvantage	Wessex Water South Somerset	21,450.00			
Finanical Disadvantage	Wessex Water Debt South Somerset			22,351.00	
Finanical Disadvantage	Wessex Water Mendip		12,600.00		
Finanical Disadvantage	The Corton Hill Trust			30,000.00	
Financial Disadvantage	Pension Wise			104,610.00	
Financial Disadvantage	Money and Pension Service South Som			137,532.00	
Financial Disadvantage	Western Power South Somerset		4,200.00		
Totals		£103,141.00	£487,151.00	£360,983.00	£75,000.00

NB: These figures are sourced ahead of full merger and other information may come to light post merger that may slightly vary the amounts.

Breakdown of West Somerset CA funding for 2023-2024

		Immediate Prevention	Specialist Casework
General service grant	Somerset Council	39,790.00	12,070.00
Grants via Citizens Advice and colleague offices	Citizens Advice - Cost of Living	15,000	
	Wessex Water	4,200	
	Citizens Advice - Open Mental Health	16,500	
	Taunton CA - Housing and Employment	5,800	
	Local Assistance Scheme	9,735	
Angel investors	Somerset Community Fund		10,000
	Employment Allowance	4,000	
	Cont. Team Leader	3,300	
	Fairfield Charitable Trust		16,500
Community agreements	Watchet Town Council		4,000
	Williton Town Council		1,000
	Minehead Town Council		5,000
	Other Parish and Town Councils		4,500
Rental income	MIND	7,980	
Community donations	Social donations		800
Totals		106,305.00	53,870.00

NOTE: The figures are based on existing agreements and are reviewed either quarterly or with the introduction of new information. Amounts can vary slightly with unforeseen circumstances.

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