

Cheltenham Borough Council
Cabinet – 18th July 2007
Single Advice Contract
Report of the A.D. Community Services

1. Executive Summary and recommendation

1.1 The issue

In April 2007 the Cabinet asked officers to work closely with advice agencies to explore the benefits of partnership working in the delivery of advice services.

1.2 This report sets out for Cabinet the conclusions of those discussions, and highlights in particular the issues surrounding two main aspects:

- The size of the contract in activity and value terms
- The type of any future agreement

1.3 I therefore recommend that:

1.3.1 Cabinet agree to move to a single contract for the commissioning of advice services to replace current Conditional Offers of Grant, from 1st April 2008.

1.3.2 Cabinet agree the timetable proposed in section 5.2 and consider the contract outline, specification and performance information requirements outlined in appendices A and B, having given due consideration to the motion approved by council on 28th June as set out in paragraph 7 of this report.

1.3.3 Cabinet agree member representation on the tender-evaluation panel in line with paragraph 6.3.

1.3.4 Cabinet formally place on record its thanks to the four advice agencies and to Cheltenham VCA for their support during this consultation process.

1.4 Summary of implications

1.4.1 Financial

The funding streams for the financing of the single advice contract are detailed within section 4 of the report. The move to a single advice contract may result in one compulsory redundancy for the Council, the costs of which are estimated to be £13,500.

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1.4.2 Legal

“The move from ‘conditional offers of grant’ to contracts is to be welcomed. Unless under performance against the terms of current agreements can be evidenced though this transition can not take place until the natural end of current agreements in March 2008.

On the basis that the value of the proposed contract will exceed £144,000, the requirements for complying with the Public Contracts Rules 2006 will apply. These include a requirement to advertise the procurement in the Official Journal of the European Union (OJEU). Legal Services are working closely the AD Community Services and the Principal Procurement Officer on the scope, specification and drafting of this proposed contract.

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1.5 Implications on corporate and community plan priorities

1.5.1 None as a direct result of this report.

1.6 Statement on Risk

1.6.1 None on the current risk register.

1.6.2 There are however some related risks that need highlighting. Should one or more of the current provider agencies fail to secure, in whole or in partnership, the new contract it is possible that they may not survive in their current form. This could lead to a loss of capacity within the voluntary sector in certain areas.

Additional external funding for complimentary services obtained by these agencies may also be lost.

Also the contract tendering process, particularly through the European Union procurement requirements, is more complex than the service level agreements or ‘offers of grant’ and should unforeseen delay occur during the tendering process it may be necessary to extend existing Conditional Offers of Grant, for a short period, to ensure continuity of service provision until the new service is in place, this being subject to the agreement of the existing service providers.

2. Background

2.1 CBC currently has four housing and advice agreements. These services are currently provided by Cheltenham Housing Aid Centre (CHAC), Citizens Advice Bureau (CAB), Cheltenham Community Projects (CCP) and Cheltenham Community Services Centre (CCSC). All services are covered by ‘Conditional Offer of Grant’ agreements and all agreements are due to end on 31st March 2008.

Cabinet, at its meeting on 12th December, 2006, endorsed in principle the proposal to move towards a single contract for advice services to achieve better coordination, reduction in duplication and an economy of scale within the service provision.

On 10th January, 2007, Social and Community Overview and Scrutiny Committee set up a working group to review the justification for the creation of a single advice agency and the best way it could be achieved. Its recommendations were that Cabinet should “withdraw its original proposals and invite the voluntary sector organisations concerned to make proposals as to how the benefits of closer

partnership working can deliver improved advisory services for the town". These recommendations were considered by the Cabinet on 17th April. Cabinet requested officers to revisit the proposal in light of these recommendations, review a possible specification for the service and the process by which the service would be procured, and report back to Cabinet in July 2007, whilst, at the same time, continuing to prepare tender documentation for a single advice contract.

- 2.2 The report of the Overview and Scrutiny Working Party had helped to highlight one of the most controversial and problematic aspects of the original recommendations, i.e. the size, both in terms of activity and of value, of the proposed contract. The management information provided by the four agencies is compiled against differing parameters, making it impossible to produce a single authoritative picture of the scale of activity. The figures set out in 5.1 below illustrate this point well.
- 2.3 During May and June, individual and collective meetings were held with the four agencies. An offer to facilitate from Cheltenham VCA was gratefully accepted and meetings were chaired by Angela Gilbert, Services Manager of Cheltenham Voluntary and Community Action.
- 2.4 One of the agencies, CCSC, announced that it would not be bidding for the contract, but the other three confirmed that they would be bidding and that they welcomed this further opportunity to be involved in discussions about the service specification, the scope of the contract and the form of tender. Without exception, their feedback was constructive and helpful and many of their suggestions have been incorporated into the final documents attached in the appendices to this report. The discussions also helped to develop some of the earlier concepts by teasing out their practicalities. The draft specification has thus continued to evolve from the original principles.
- 2.5 Paragraphs 4 and 5 below expand upon the two key issues which emerged from the consultation, i.e. the question of whether a competitively tendered contract is the preferred commissioning vehicle, and the question of the contract size.

3. Comments on the Social and Community Overview and Scrutiny Report

- 3.1 In reviewing the report from Social and Community Overview and Scrutiny Committee, Cabinet Members and officers believe that whilst it made a useful contribution it was somewhat retrospective in content and involving itself more in the interpretation of terminology rather than focusing forward to modernising the service.
- 3.2 Cabinet Members and officers are also of the view that:
 - a) Whilst the original cabinet report arguably was not sufficiently detailed it did provide a good foundation upon which significant detail has been built through the consultation process, by agencies, stakeholder groups, commissioners and officers, to enable an informed decision to be taken.
 - b) Rather than attempting to address the variations of interpretation of terms it is more constructive to define a new type of advice contract. Looking at maximising the income and minimising the debt of those who find themselves in difficulty, and whose homes are threatened, we believe that the major priority for a district housing authority should be focused on retention of the home and prevention of homelessness. An attendant priority is to ensure the well being of those who present, and assist them either directly, through advice, or by correctly sign

posting to those organisations or agencies that have the expertise and resources to provide solutions.

- c) It would be counter productive to attempt to split the service currently commissioned by the council into a number of different and smaller contracts not least because of the difficulty posed, and highlighted in the O & S report, when trying to badge and quantify the services. We believe a single comprehensive contract avoids duplication, confusion over terminology and various formats of management information and provide best value for money when commissioning new services for the council tax payers of Cheltenham (see also section 5).
- d) Whilst a small number of current advice areas may be excluded from the draft specification there are defensible reasons for so doing. Some listed services are historical anomalies or services identified as being in the remit of other more appropriate funding agencies or simply of questionable value to the commissioner.
- e) Whilst accepting that should current delivery agencies not submit successful tenders there could be a loss of capacity and mixed and matched funding for related services; some of this funding, and indeed new funding streams for related services, would follow the service or be gained through bids from a knowledgeable and pro active delivery organisation.
- f) It is not for the council to dictate to independent service organisations how they should organise their business. Successful organisations adapt to changing circumstances and this is the hallmark of successful, energetic and modern organisations. We are confident that our existing providers in Cheltenham will respond positively and effectively to the challenge.

4. Conditional Offer of Grant, Partnership Agreement or Contract.

- 4.1** Currently funding agreements between the Council and third sector service providers use a Conditional Offer of Grant as the commissioning vehicle, the preferred replacement, in their time, for Service Level Agreements. These vehicles are not seen as the most appropriate for current day commissioning of services, as highlighted by Legal Services in the review report submitted to Cabinet on 27th March:

“Conditional Offers of Grant are a type of legal agreement, binding on both the council and the recipient organisation, and the terms can be altered only by agreement.

The format of the Conditional Offers of Grant does not lend itself well to the creation of legal responsibilities for the delivery of the services for which the grants are paid.

Clearer provisions are required to address monitoring requirements and to deal with the consequences of poor performance.”

This view is supported by the Council's procurement team.

Legal services also stated that “the move from ‘conditional offers of grant’ to contracts is to be welcomed”. Unless under-performance against the terms of current agreements can be evidenced though, this transition cannot take place until the natural end of current agreements in March 2008.

- 4.2 A partnership agreement involving two or more of the current providers could also prove problematic in terms of both specifying and managing the procured service. In order to avoid costly and unnecessary duplication, it would be preferable for the Council to commission and manage through a single lead organisation – similar to Shelter’s role in the earlier county-wide youth housing advice contract.
- 4.3 In either case the agreement would be viewed as a contract simply by another name, and thus begs the question: why not have a contract in the first place? If the purpose is to avoid a tendering process this may not be achievable, let alone desirable or even lawful. Procuring a service of the type and values referred to in this report is caught by Regulation 8 and Category 27 of Part B of Schedule 3 of the Public Contracts Regulations 2006 and would require a competitive tendering exercise following the OJEU notification procedure. It is also caught by the Council’s own Contracts Rules requiring it to seek tenders from at least three relevant organisations. It would be difficult to prove the council had obtained best value if it had not market-tested or tendered. The use of a contract as the best vehicle to specify and manage the service and tendering as the best method to evidence best value are recommended by officers.
- 4.4 It is noted that a new multi authority group has been formed to look at a county wide contracting process for legal and advice services. The timescale for this is not co terminus with Cheltenham’s current process. We recommend, however, that officers keep a watching brief and consider any proposals when looking at contract renewal for 2011.

5. The Service – Sizing the Contract

- 5.1 There are a number of options for setting the level of the service value from which Cabinet could chose:
 - a) The current level of funding into the Conditional Offers of Grant for provider agencies in 2006/7 was £256,800 pa (of which £231,900 goes to direct service provision).
 - b) The figure for current payments for all housing, money, debt advice and related services, according to the agencies’ original figures, is £213,387pa
 - c) The figure currently paid for Housing and Housing Benefit related advice services, according to the agencies’ revised figures, is £181,500pa
 - d) The current sum proposed by the formula used in the Overview and Scrutiny Working Party’s report for housing and benefits advice, is £139,781pa or £169,165 when including money advice.
- 5.2 Sums vary as it is acknowledged by both officers and the O&S Working Party that there are difficulties in quantifying, and separating out, categories of advice under current arrangements as the information produced by different agencies is recorded in different ways using different formats. There were also differences of opinion over the use of categories, in the main between benefits advice, debt advice and money advice. The original report assumed that this was all about income maximisation and

that the knowledge and skills required were transferable, impartable or interchangeable. Some argue that they are separate disciplines.

- 5.3** Whichever of the sums, ranging from £181,500 to £256,800, is selected, the question remains of what to do with any remaining balance if it does not include the whole. It makes no sense to argue strongly for a single advice contract to cover the majority of council-funded advice services, whilst accepting a continuation of the current arrangements, with all their inherent defects, for the remainder.

The options are, therefore, either to let a second contract covering those advice areas not captured within the main contract, or to accept that it would be more practical, both in terms of contract-management and service-provision to let a new single contract focused on current council obligations and priorities.

- 5.4** It is felt that separating out these services into a major and minor agreement as a combination of contract and/or service level agreement would be resource-intensive in administrative terms and be inefficient in service delivery terms. It is therefore recommended that services currently delivered in this field be refocused to address council duties and priorities and issued as a single contract (ref. draft information for tenderers and service specification and management information requirement at appendices A and B) .

- 5.5** By issuing a new single contract, focused on district council duties and business plan priorities, there is a perceived risk that some of the advice fields offered, in particular by CAB, will fall outside the specification. For instance, the CAB currently offers advice on topics as divergent as capital gains tax and international travel arrangements. It would be wrong, however, to assume automatically that, because CAB offers these services, they are funded by CBC grant. In fact, CBC contributes £98,600 per annum to CAB out of a total gross income for 05/6 of £428.6k.

- 5.6** The draft specification recognises that although the service-provider will not be required to offer the same specialist level of advice across all service areas, it will be required to signpost clients to alternative sources of specialist advice for those areas not caught within the scope of the contract. An important part of the tender-evaluation process will be to identify the arrangements which tenderers will put in place for the reception and early identification of a client's needs through some type of triage mechanism.

Appendix C sets out in tabular form services currently provided by the agencies; services for inclusion in the draft specification and services for which the specification seeks a signposting service only.

- 5.7** In recognition of the fact that one of the initial drivers for the review was the elimination of duplication between the agencies, it is also important that the council should not be funding services which duplicate existing council services. The draft specification attempts to recognise this risk.
- 5.8** The view has been expressed that the specification is not sufficiently specific as it does not produce an extensive schedule of all the individual topics to be covered. Whilst it is important that the specification should be unambiguous, it is deliberately framed around outcomes rather than inputs in a conscious attempt to reduce the scope for later demarcation disputes with the successful tenderer.

6. Timescale

- 6.1 It is just still possible to deliver on the original timescale assuming there are no unforeseen delays. Should delays occur, it would be necessary to extend current conditional offers of grant beyond the end of March 2008 to ensure a seamless service delivery.
- 6.2 The current amended timeframe is:

Event	Date
Report to cabinet	18 th July 2007 + 5 days
European Journal advert At risk letters to current providers	24 th July 2007
Expressions of interest	Return by 10 th September
Tender process	Sept – Nov 2007 To include presentations by shortlisted agencies.
Cabinet approve tender and award contract	11 December 2007
Contract issued Termination notices issued	End of December 2007
New contract starts	1 st April 2008

- 6.3 In order to achieve these timescales, it will be necessary to have in place an officer/member tender evaluation panel ready for the return of expressions of interest in September. It is recommended that officers on the panel should include a representative of the Legal Services Team and the Procurement Manager as well as the Deputy Chief Executive. It would be appropriate for the Cabinet Member Quality of Life and one other Cabinet Member to act as the councillor representatives.

7. Council resolution

- 7.1 On 28th June, 2007, the Council debated a motion proposed by Councillor Steven Jordan that:

"This Council notes that the plans for the 'Single Advice Contract' contained in the current draft contract and specification will not include a range of services that are currently funded by the Council including such things as Consumer issues; Employment issues; Health issues; Immigration; Tax; Relationship breakdown; Travel; Utilities and so on when there is a housing component to them. This Council believes that safeguarding such areas of advice is vital to the wellbeing of its Citizens and, therefore, agrees that they should continue to be supported with Council funding and urges the Cabinet to include them in the proposed contract".

- 7.2 Following a lengthy debate and a recorded vote, the motion was carried by a majority of 18 votes to 14 with 2 abstentions.

Whilst it is not within the power of the Council to instruct the Cabinet on issues which fall within the scope of the Executive's authority, it would be appropriate for the Cabinet to take into account the strength of feeling shown by the Council, and to

demonstrate that due consideration has been given to the views expressed by the majority of the Councillors present at the meeting on 28th June.

8. Consultation

8.1 Consultation with the agencies took place –

- a) With agencies individually, facilitated by the Overview and Scrutiny Working Party, in January 2007.
- b) With the agencies both collectively and individually, facilitated by Cheltenham VCA, in May and June 2007.
- c) With internal and external stakeholder in May and June 2007.

Background Papers	Single Advice Contract report to Cabinet 12/12/06 Report of the O&S Working Group 2/4/2007
Report Author	Peter Woolley, AD Community Services, 01242 774964, peter.woolley@cheltenham.gov.uk
Accountability	Cllr Chris Ryder
Scrutiny Function	Social and Community

**OUTLINE CONTRACT FOR THE PROVISION OF
A SINGLE ADVICE SERVICE
for
Housing, benefits, debt, income and related advice
FOR CHELTENHAM BOROUGH COUNCIL**

INFORMATION AND INSTRUCTIONS TO TENDERERS

NOTE: This information is provided for the assistance of Tenderers but does not form part of the Tender documents.

PART A- GENERAL INSTRUCTIONS

1. The Service

1.1 Vision

Cheltenham Borough Council's vision is to secure:-

- a fixed term integrated borough wide quality advice service on housing, benefits, debt, income maximisation and related matters;
- an agreed standard of management information in order to monitor and evaluate the advice service;
- the ability to ensure best value through performance management and continuous improvement in the provision of the advice service.

1.2 Aims

Cheltenham Borough Council aims:-

- to establish meaningful contact with Cheltenham residents to provide a tailored advice and support service covering housing, benefits, debt, income and related matters;
- to prevent homelessness and enable access to, and maintenance of, sustainable residential tenure;
- to improve co-ordination and standardisation of an advice, support and tenancy sustainability service within the borough;
- to provide and direct resources to meet the housing advice and related support needs of vulnerable people in Cheltenham;
- to ensure the availability and accessibility of relevant advice and support services
- to facilitate awareness through education and publicity of the availability of these service to all service users and potential service users and groups.

2. Period of Validity

- 2.1 Tenderers are required to keep Tenders valid for acceptance for a period of six calendar months from the date of receipt of Tenders.

All responses must be received in hard copy(1) and electronic copy(1) on CD by **Noon [date]**– any envelopes received after this date will not be considered for inclusion in this tender process.

3. Commencement Date and Contract Period

- 3.1 The successful Tenderer will be required to provide the Service from 1st April 2008 until 31st March 2011.

4. Clarification of Meaning of Contract

- 4.1 Tenderers should seek to clarify any points of doubt or difficulty with the Council before submitting a Tender. For this purpose you may contact the following staff by email where possible:

Angela Cox
Corporate Procurement Officer
Cheltenham Borough Council
Email: angela.cox@cheltenham.gov.uk
Telephone No. Tel: 01242 775223

If you wish to raise further points of clarification then these matters should be submitted in writing via email, not later than one week prior to the return date for the attention of Angela Cox.

5. Tendering Procedure

- 5.1 Tenders for the provision of the Service under the contract must be made on the form of Tender which must be signed by the Tenderer.
- 5.2 All documents requiring a signature must be signed:
- 5.2.1 where the Tenderer is a Company, by two directors or by a director and the secretary of the Company, such persons being duly authorised for the purpose
- 5.2.2 where the Tenderer is a partnership, by a duly authorised director of each company within the partnership and indicate the lead partner for the bid.

and the Tenderer shall produce forthwith upon request by the Council documentary evidence of any authorisation referred to in paragraphs 5.2.1 and 5.2.2 above.

- 5.3 Tenderers must obtain for themselves at their own responsibility and expense all information necessary for the preparation of their Form of Tender.
- 5.4 A Tender will not be considered for acceptance if:
- 5.4.1 the Tenderer has not tendered for the whole of the Service in accordance with the Specification and Contract;

- 5.4.2 it is not in accordance with the Specification and Contract;
- 5.4.3 the Tenderer makes any variation to the Specification or other documentation comprising part of the Contract;
- 5.4.4 it contains any gaps or omissions.
- 5.5 The Council will need to fully satisfy itself that the Tenderer is of sound financial standing and has sufficient working capital, skilled staff, equipment and other resources available to them to provide the Service.
- 5.6 The documents to be submitted with the Form of Tender are as follows:
- 5.6.1 Pricing Schedule
- 5.6.2 The Questionnaire (Organisational Information, Economic & Financial Standing);
 Technical Capability, References.
- 5.6.3 Implementation Plan
- 5.6.4 Cost saving opportunities
- 5.6.5 Customer Relationship Arrangements
- 5.6.6 Evidence of quality and accreditation standards held
- 5.7 **All the documents must be placed in the envelope provided or in a plain envelope endorsed "Housing, benefits, debt, income and related advice Services Tender to be returned by Noon [Date] which in either case must then be sealed. The envelope shall in no circumstances bear any name or mark indicating the name of the sender.**
- 5.8 Tenders must be delivered in the manner described to:
 Angela Cox
 Principal Procurement Officer
 Cheltenham Borough Council
 Room B42 Municipal Offices
 Promenade
 Cheltenham GL50 1PP By **Noon [Date]**
 Email copy to be sent to Angela.cox@cheltenham.gov.uk
- 5.9 The proposed date for awarding the Contract is [Date]
- 5.10 The Weighting Criteria are as follows:-
- | | |
|--|-----------|
| Priority Information | Pass/Fail |
| Price | 60% |
| Quality/Technical Ability / Service Delivery | 40% |

6. Freedom of Information

- 6.1 The Freedom of Information Act 2000 gives a general right of public access to all types of information held by the Council, sets out various exemptions from that general right and places a number of obligations on the Council with regard to disclosure of information.
- 6.2 Tenderers are advised that the Council may be required by the Act to disclose the contents of the Contract Documentation.

<u>Single Advice Contract – Service specification and management information requirement</u>		
<u>Activity</u>	<u>PI</u>	<u>Period</u>
Benefits/Debt Advice and Advocacy		
To provide advice on all matters relating to debt and, where appropriate and with the client's permission, to negotiate on his or her behalf with their creditors, to represent them in court proceedings and tribunals and with the Official Receiver, insolvency practitioners and other similar agencies and to seek to obtain financial assistance for them. Priority to be given where tenure is perceived to be threatened or homelessness is the likely outcome if not resolved.	No. of Individuals approaching the service with an issue. No of new cases opened. No of referrals on. No of straight signposting. Activity outcome.	Quarterly
To provide advice and assistance in claiming on all available benefits and to seek to maximise the income of clients and to liaise with all relevant benefit agencies and, where necessary, to represent claimants at tribunals and appeals.	Evidenced direct income/set aside gained. No of clients advised. No of clients advised and assisted leading to increased income through benefit take-up. No. of representations at tribunal. Tribunal outcomes.	Quarterly Annual Annual

Promoting good debt prevention and assistance with benefit take up in accordance with the council's Benefits Take Up Strategy	Evidenced examples	Annual
To be a member of and an active participant in the Cheltenham Benefits Forum.	No. of meetings attended. Joint working initiative implemented.	Annual
To assist debtors to apply to be accepted onto the Council's "In Debt – A Way to Pay" scheme. To be represented at "In Debt – A Way to Pay" scheme meetings and to help determine applications other than those made by applicants assisted by the Contractor.	No. of applications made. No. of meetings attended.	Annual Annual
To publicise the service to all potential users, including people with disabilities or for whom English is not their first language and to ensure their views and requirements are fully integrated into the service.	Initiatives implemented. All quarterly returns analysed by gender, ethnicity, disability	Annual Quarterly
To assist relevant agencies and groups develop policies and best practice in housing and income maximisation advice.	Sessions held	Annual
In partnership with relevant organisations, make available current knowledge and expertise on welfare rights and benefit take up issues to staff from related organisations. To provide at least four training courses each year for the staff of Cheltenham Borough Council, Cheltenham Borough Homes and user groups concerning welfare rights issues and matters relating to benefit take up.	Sessions held	Annual
Housing Needs Advice and Homelessness Prevention		
To accept referrals from Cheltenham Borough Council for statutory advice and assistance pursuant to s179 (1) Housing Act 1996 (as amended by the Homelessness Act 2002).	No of acceptances. Activity outcome.	Quarterly
To advise and provide practical assistance to all persons seeking rented accommodation in Cheltenham, either in the public or private rented sectors, to find suitable accommodation by examining with them all appropriate housing options and, where appropriate, to explain how the Council's current housing allocations and its proposed choice-based allocations schemes work. To be a member of, and actively participate in, the Cheltenham Homelessness Forum.	No of individuals. Activity outcome. Meetings attended.	Quarterly Annual

<p>To actively promote any private letting, leasing or bond scheme with a view to attracting new landlords to accept tenants on lower incomes or in receipt of benefits and to provide information to those in housing need on how to access them.</p> <p>To maintain a list of private landlords with suitable accommodation and facilitate access to appropriate accommodation. Act as an intermediary in introducing people with housing needs to prospective landlords.</p> <p>To regularly participate in the Cheltenham Landlords Forum, assist them in their work and promote good practice and standards in consultation with the council's enforcement officers..</p>	<p>No. of private lets secured. No. of new lets attracted. Examples of information issues. No. of Forum meetings attended.</p>	<p>Quarterly Annual Annual Annual</p>
<p>To provide advice and, except where there would be a conflict of interest, assistance to all tenants and landlords about their respective rights and responsibilities and negotiate in disputes. To assist tenants in dispute with their landlords and, with the tenant's consent and where appropriate, to negotiate with landlords to try to resolve disputes amicably and so as to reduce the risk of tenants losing their homes.</p>	<p>No. of dispute negotiations + outcomes</p>	<p>Annual</p>
<p>To keep an up to date contact list of landlords and details of how to apply for accommodation.</p>	<p>No. of applications made. No. of RSL units secured.</p>	<p>Quarterly</p>
<p>To ensure that a full range of housing options and related support services are promoted; including, but not limited to, mutual exchange/homeswap/national mobility schemes/disabled facility grants/lifeline community alarms/private sector accommodation and supported housing.</p>	<p>No. of applications completed by type. No. of units secured. No. of grants secured.</p>	<p>Annual</p>
<p>To be an active member of relevant vehicles for accessing housing and related support services including, but not exclusively, the SPA and SHOP organisations.</p>	<p>No. of meetings attended.</p>	<p>Annual</p>
<p>Where requested, to assist homelessness applicants seeking a review of any decision by the Council to pursue it in accordance with Section 202 of the Housing Act 1996.</p>	<p>No. of assisted reviews. Outcome of reviews.</p>	<p>Annual</p>

Other Related General Advice and Sign Posting		
To provide advice where appropriate, and sign post to specialist advisors or agencies where necessary, on related issues that affect tenancy sustainability, including but not restricted to income maximisation, family breakdown, domestic violence, loss of job, immigration and nationality, anti social behaviour and harassment. To identify and refer to appropriate statutory agencies where eligible for service.	No. of cases. No. of referrals. Outcomes.	Quarterly
Monitoring, reporting and consultation		
To submit monthly returns to the Council showing the number of households, who have approached the Contractor for housing and benefit advice because they consider themselves to be homeless or under threat of homelessness, or at risk of becoming homeless, and which the Contractor has prevented from continuing or becoming homeless.	Pro forma return.	Monthly
To submit Initial Needs Assessment and Outcome forms as prescribed by the Council, and any other performance management framework required by the council, in respect of every client at such stages and within such timescales as determined by the Council.	Pro forma return.	On completion
When requested, to provide the Council with such information as it may reasonably require in order to respond to requests it has received from central government departments, the Audit Commission and similar bodies and to enable it to develop its housing related strategies.	Information timely presented in the required format.	Within 10 working days of request
To conduct satisfaction surveys of service users on all aspects of the services being delivered no less frequently than annually and to evidence the use to which the results of such surveys are put to effect improvements to the services provided by the Contractor.	Survey completed. Results and service improvement report presented.	At least annually.
To ensure that service users are consulted and involved in any proposed service changes .	Evidenced at service review	Annually
To ensure that files, records and computer based data are maintained, for the period of the contract and for one year beyond that , for the purpose of providing accurate statistics whenever required.	Statistics timely presented in the required format.	Within 10 working days of request
To develop information sharing protocols with relevant agencies where this would ensure efficient and cost effective service delivery.	Completed protocols in active use.	Annual
General Service Requirements		
The Services must be provided or accessed from premises within Cheltenham town centre which is served by public transport and, preferably, within easy walking distance of		

Cheltenham Borough Council's main Housing Options Service.
To provide the service between 9am – 5pm Monday to Friday to include a drop in service - service provision can be withdrawn for a weekly team meeting of one hour and a drop in service must be available at all other times.
To offer a range of ways for service users to contact them – by telephone, in person or electronically – all of which are dealt with efficiently and effectively.
To provide an out of hours appointment scheme for those who, due to work and other commitments, are unable to access the service during core hours.
The Contractor will be required to create and maintain a website which included specified information and hyper-links to other sites with specific translation facilities.
In consultation with the Council, to bid for external funds to enable additional advice and support services to be provided in Cheltenham. Evidence of this must be provided to the council at the annual review.
To provide a clear and well used procedure manual, which is reviewed and updated appropriately.
To ensure advice services comply with community legal service standards and to maintain a well established internal service monitoring scheme.
To use well established, regularly reviewed and monitored protocols to liaise with appropriate partner agencies within the county council, primary care trust and criminal justice agencies.
Working with the council, cheltenham borough homes and other relevant agencies to develop: <ul style="list-style-type: none"> - A referral network and common policies for accessing housing of all tenures; - Housing solutions and initiatives between agencies to enable people to access and sustain accommodation; - Build upon agreements with other organisations and agencies to avoid service duplication.
To implement and promote a best practice complaints procedure which encourages feedback from service users and uses it to improve levels of service delivery.
Equal Opportunities
To have in place and to review regularly policies and working practices to ensure that no aspect of the service discriminates against any person, or other organisation, on the grounds of race, ethnic origin, disability, nationality, gender, sexuality, age, class, appearance, religion, responsibility for dependants, unrelated criminal activities, being HIV positive or with AIDS, or any other matter which causes a person to be treated with injustice.
To ensure that all written communication is easy to understand and compliant with legislation and available in a variety of formats and other languages on request.
To publicise its equal opportunities policy on the premises in public areas and interview rooms
To ensure that all advice given orally is summarised and followed up in writing with relevant advice leaflets and information enclosed whenever it is appropriate to do so and that all advice is recorded on the client's computerised record.
To ensure that adequate private interview space is made available for clients which enables clients to be accompanied by a friend, relative, advocate and/ or interpreter if they so wish.
To provide home visits to clients who are unable to attend normal advice sessions owing to

disability or illness wherever it is safe to do so and to publicise the availability of this service.
The Contractor will be required to comply with all statutory provisions relating to the provision of the Service.
To provide reasonable translation facilities to users of the Service including, as necessary, through Language Line or some similar service.
To provide quarterly activity reports in a form specified by the Council within three weeks of the end of each quarter (i.e. 30 th June, 30 th September, 31 st December, 31 st March), such form to include after the first year year-on-year comparisons.
To provide an annual return in a form specified by the Council within four weeks of the 31 st March in respect of the twelve month period ending that day.

Service Expectation

The prevention of homelessness and sustainable tenure in sustainable communities are council business priorities and provide the prime focus for the advice service which is being commissioned. Other areas of advice which do not form part of this specification will be provided by other agencies and funded through different funding schemes. The successful contractor will put in place appropriate arrangements to signpost clients, where relevant, to those other agencies.

<p>advisory services provided by currently funded agencies as specified in their Conditional Offers of Grant.</p>	<p>of these the services that will be funded by the Council in the new contract with priority given where a home is at risk or there is a risk of homelessness. – there will be consolidation to remove duplication and wording may vary and will be that contained within the contract specification</p>	<p>of which the expectation would be for sign posting only</p>
<p>CHAC:</p> <ul style="list-style-type: none"> - The statutory housing advice service including:- - Accepting referrals from CBC for statutory advice and assistance pursuant to s.179 (1) housing Act 1996 (As amended by the Homelessness Act 2002) - Assessing clients problems - Researching information - Advising clients on options open to them - Discussing the possible consequences of these actions - Assisting with the understanding and completion of forms and other documents - Negotiating with third parties - Representing in Court or tribunals where staff are available - The exercise of a responsible influence on social policies and services both locally and nationally - Participation in the 	<ul style="list-style-type: none"> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> <li style="text-align: center;"><input checked="" type="checkbox"/> 	

<p>Cheltenham Homelessness Forum in delivering the council's Homelessness Strategy for preventing homelessness in Cheltenham and in ensuring that all Initial Housing Assessment Forms are provided to Cheltenham Borough Council within four weeks of the last day of the last quarter.</p> <ul style="list-style-type: none"> - Referring Clients to specialist advisors/solicitors as appropriate - Referring clients to CBC where statutory homelessness duties exist. - Accepting CBC referrals to the Bond Scheme and Money Advisor <p>In particular, the advice service shall cover the following areas;</p> <ul style="list-style-type: none"> - Advising persons seeking accommodation, whether by way of house purchase, renting from CBC, Registered Social Landlords or private landlords; - Assisting clients to examine their housing needs or problems and to suggest possible ways of meeting them; - Advising Homeless persons and those threatened with homelessness; - Advising private landlords and tenants on landlord/tenant relationships and remedies where problems have arisen; - Advising on disrepair and improvement of property, security of tenure - Advising on housing benefit and council tax; - Promotion of the Council's private tenants charter and the landlords Code of practice. 	<p style="text-align: center;"> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> </p>	
<p>CCP: The advice service offered shall include -</p> <ul style="list-style-type: none"> - Intensive support to young people and families with children (0-16 years) 	<p>Picked up as a generic support service where a</p>	<ul style="list-style-type: none"> - The provision of emergency/supported housing – This is a Supporting People/Housing Corp funding issue.

<ul style="list-style-type: none"> - Young people aged 13-25 years who are in need of housing, training, support and advice. Parents and children (0-16 years) struggling to cope with family life. - The provision of emergency/supported housing - The provision of food parcels to families and individuals in need - Assessing clients problems - Researching information - Family Mediation - Advising clients on options open to them - Discussing the possible consequences of these actions - Assisting with the understanding and completion of forms and other documents - Negotiating with third parties - The exercise of a responsible influence on social policies and services both locally and nationally - Participation in the Cheltenham Homelessness Forum in delivering the council's Homelessness Strategy for preventing homelessness in Cheltenham and in ensuring that all Initial housing assessment forms are provided to Cheltenham Borough Council within four weeks of the last day of the last quarter. - Referring Clients to specialist advisors/agencies as 	<p>tenancy is deemed to be threatened or homelessness can be prevented</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p> <p>with the exception of training.</p> <p>Picked up in Supporting People/Housing Corp budgets</p> <p>Not directly from this contract</p> <p style="text-align: center;"><input checked="" type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Not directly from this contract</p> <p style="text-align: center;"><input checked="" type="checkbox"/></p> <p style="text-align: center;"><input checked="" type="checkbox"/></p> <p style="text-align: center;"><input checked="" type="checkbox"/></p> <p style="text-align: center;"><input checked="" type="checkbox"/></p> <p style="text-align: center;"><input checked="" type="checkbox"/></p> <p style="text-align: center;"><input checked="" type="checkbox"/></p>	<ul style="list-style-type: none"> - The provision of food parcels to families and individuals in need – this is provided through the organisations fund raising activities. - Provision of education/respite care and supervised contact sessions.
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<p>appropriate</p> <ul style="list-style-type: none"> - Referring clients to CBC where statutory homelessness duties exist. - Provision of training/education/respite care and supervised contact sessions. 	<p style="text-align: center;"> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> </p>	
<p>CAB:</p> <ul style="list-style-type: none"> - assessing clients' problems - researching information - advising clients on options open to them - discussing the possible consequences of these options - assisting with the understanding and completion of forms and other documents - negotiating with third parties - representation in Court or at Tribunals where staff are available - the exercise of a responsible influence on social policies and services both locally and nationally. <p>The advice service shall cover the following areas:</p> <ul style="list-style-type: none"> - Communication - Post and Telecommunications, Radio & T.V., Access to information. - Travel, Transport and Holidays - Accidents, all forms of Travel and Transport & Time-share Property, International Travel Requirements. - Immigration and Nationality - Immigration and British Nationality, Foreign Nationality, Race Relations. - The Administration of Justice - Civil Procedures, Tribunals, Legal Aid and Advice, Prisons and Ex-Prisoners. 	<p style="text-align: center;"> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> </p> <p>where homelessness or threat of loss of tenure is an assessed issue.</p>	<p>On all other issues pertaining to the assessment or query or in-house if the service is available through an additional funding source or supervised volunteer expertise – a number of these services are already sign posted.</p> <ul style="list-style-type: none"> - Communication - Post and Telecommunications, Radio & T.V., Access to information. - Travel, Transport and Holidays - Accidents, all forms of Travel and Transport & Time-share Property, International Travel Requirements. - Immigration and Nationality - Immigration and British Nationality, Foreign Nationality, Race Relations in general. - The Administration of Justice -, Land Reform, Crime and Criminal Procedure, Prisons and Ex-Prisoners – for all other matters.

<ul style="list-style-type: none"> - Education - General, Pre-school education, Primary and Secondary education, Further Education, Educational Visits and exchanges. - Employment - Ending Employment, Health and Safety, Contracts, Industrial Relations, Industrial Rehabilitation and work, Discrimination, sexual harassment, Specific Occupations, Employment Agencies. - National and International - U.K. Govt. - central and local, population census, civil defence, religious organisations, embassies and consulates, European countries, United Nations, Emigration. - Local Information - Names and Addresses of Local Councillors, J.P.s, M.P.s, Doctors, Location of Council Offices, Courts. - Family & Personal - Family law, social services, change of name, sexuality, one parent families, violence, ending relationships, relationships and money, relationships and housing, children, carers, elderly, death, poverty, miscellaneous. - Social Security - Claims for benefit, income-related benefits, contributory benefits, non-contributory benefits, benefits for people in special circumstances, social security common rules. - Health - Disability, women's health, mental health, National Health Service, private medical treatment, local authority health and welfare services, addiction. - Housing, Property and Land 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<ul style="list-style-type: none"> - Education - General, Pre-school education, Primary and Secondary education, Further Education, Educational Visits and exchanges. - Employment - Ending Employment, Health and Safety, Contracts, Industrial Relations, Industrial Rehabilitation and work, Discrimination, sexual harassment, Specific Occupations, Employment Agencies. - National and International - U.K. Govt. - central and local, population census, civil defence, religious organisations, embassies and consulates, European countries, United Nations, Emigration. - Local Information - Names and Addresses of Local Councillors, J.P.s, M.P.s, Doctors, Location of Council Offices, Courts. - Family & Personal - Family law, social services, change of name, sexuality, violence, ending relationships, relationships and money, relationships and housing, children, carers, elderly, death, poverty. – for all other matters - Health - women's health, mental health, National Health Service, private medical treatment, local authority health and welfare services, addiction.
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where unemployment or lack of income is a contributory factor.

one parent families, violence, ending relationships, relationships and money, relationships and housing, children, carers, elderly, death, poverty.

Disability, welfare services.

<ul style="list-style-type: none"> - Undertake initial screening for homeless people, identification of status of occupier, problems of occupancy, problems at end of occupancy, public environmental issues. - Tax and Duties - Community Charge/Council Tax, Income Tax, Car Tax, Stamp Duty, VAT, Capital Gains Tax, Capital Transfer Tax and Inheritance Tax, Development Land Tax. 	<p>all but public environmental issues.</p> <p>Community Charge/Council Tax, Inheritance Tax.</p>	<ul style="list-style-type: none"> - Property and Land - public environmental issues. - Tax and Duties - Income Tax, Car Tax, Stamp Duty, VAT, Capital Gains Tax, Capital Transfer Tax and Inheritance Tax, Development Land Tax.
<p>CCSC The advice service offered shall include:-</p> <ul style="list-style-type: none"> - assessing clients' problems - advising clients on options open to them and discussing the possible consequences of these options - assisting with the understanding and completion of forms and other documents - negotiating with third parties - representation in Court or at Tribunals where staff are available 	<p style="text-align: center;"> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> </p>	