



Monitoring Form – Voluntary Organisation Support Grant

As part of your application to the Council's Voluntary Organisation Support grant, you agreed that in the first twelve months of funding, your organisation would meet the achievements detailed below.

Part of the application process was an agreement to provide evidence in relation to what you are doing to achieve these targets. We therefore require you to complete this simple monitoring form on a quarterly basis. The sheets are to be returned to us no later than ten days after the end of the following periods:

- Q1 April – June 2017
- Q2 July – September 2017
- Q3 October – December 2017
- Q4 January – March 2018

Please demonstrate how you are achieving:

- 1) Develop the service to best meet the needs of present and emerging clients**
- 2) Maintain the quality of our advice**
- 3) Make it easier to get advice**

1) Develop the service to best meet the needs of present and emerging clients

Project	Activity to make this happen	Annual Target	Quarterly target	Quarterly performance
Increase number of calls answered on Adviceline whilst maintaining quality	Work with Adviceline phone group	Increase average call answer rate from 39% to 45%	Improvement from 39%	
	Recruit new advisers –see 2			
Conduct annual advice needs analysis to ensure we meet the needs of the community	Advice needs analysis	Completed by October	Completed Q2	
Seek out and respond to client, staff and partner feedback	<ul style="list-style-type: none"> • Client survey • people survey • Partner survey 	Completed by October	Completed Q2	
Embed Stand up for Equality	Set up trustee working group to oversee equality work	2 meetings pa	Meeting in Q2 Meeting in Q4	
	Work with Citizens Advice Equality Team to build up our knowledge	Relationship with Equality Team	Q2 establish relationship Q4 Equality Team giving support	

2) Maintain the quality of our advice				
Project	Activity	Annual Target	Quarterly Target	Quarterly Performance
Use supervisors effectively	A lead supervisors for the major advice topics debt, housing, benefit, employment	Supervisors all have lead areas	Completed Q4	
Recruit and train new advisers for face to face and phone	Recruit and train new advisers	10 new advisers on advice rota	Q1 – 3 Q2 – 2 Q3 – 2 Q4 - 3	
Develop existing advisers	Training and Development activities	At least 12 existing advisers taking part	Q1 – 3 Q2 – 3 Q3 – 3 Q4 - 3	
Maximise outcomes from Citizens Advice Quality Assurance quarterly reports support advisers	Action areas for improvement from QAA feedback tool	Information informs appraisals	Discussions at monthly Supervisor meetings	

3) Make it easier to get advice				
Project	Activity to make this happen	Annual Target	Quarterly Target	Quarterly Performance
Review face to face operating model	Analyse opening hours for drop in and appointments and make adjustments based on need	Recent temporary reduction in Bishop's Stortford drop in. Revert back to full opening hours. Evaluate best use of resources to client demand	Q2: revert back to full opening for Bishop's Stortford Q4: Evaluation completed and opening hours adjusted as necessary	
Increase calls answered on Adviceline whilst maintaining quality – see 1				
Pilot Skype for BSL and general clients	Set up Skype for BSL at Ware and Stortford	Skype being used for advice	Q1: Skype set up at Ware Q2: Skype set up at Stortford once new broadband line installed	
	Pilot Skype advice for general clients	Skype being used for advice for 5 clients	Q3 start using Skype for advice Q4: 5 clients advised by Skype	
Promote advice channels including face to face, phone and online	Communications and marketing plan and team of volunteers	Ways to access advice promoted in community	Q1: communications and marketing plan Q2: Communications team Q3: Promotional activity starts Q4: promotional activity ends	

In addition, can you please supply us, by the end of May, with quarterly and yearly targets so your achievements can be monitored and reported to Councillors throughout the year. As your achievements will be monitored in a formal manner, can you please ensure you meet the reporting deadlines stated above. Failure to do this may jeopardise further funding opportunities for your organisation.

Completed by:

Name Laura Hyde

Date 18/5/17

Position in organisation Chief Executive

Signed _____