



## 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**

| <b>Project</b>  | <b>Activity to make this happen</b>  | <b>Annual Target</b>                              | <b>Quarterly target</b>                                      | <b>Quarterly 1 performance</b>                               | <b>(B)RAG</b> |
|---|--|---|--|--|---------------|
| 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%   | April 39%<br>May 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   | Completed Q2   |               |
| Seek out and respond to client, staff and partner feedback                        | <ul style="list-style-type: none"> <li>• Client survey</li> <li>• people survey</li> <li>• Partner survey</li> </ul> | Completed by October                              | Completed Q2   | Completed Q2   |               |
| Embed Stand up for Equality   | Set up trustee working group to oversee equality work  | 2 meetings pa                                     | Meeting in Q2<br>Meeting in Q4                               | First working group meeting<br>June 17                       |               |
|   | Work with Citizens Advice Equality Team to build up our knowledge  | Relationship with Equality Team                   | Q2 establish relationship<br>Q4 Equality Team giving support | Q2 establish relationship<br>Q4 Equality Team giving support |               |

| <b>2) Maintain the quality of our advice</b>  |   |   |  |   |               |
|---|---|---|--|---|---------------|
| <b>Project</b>  | <b>Activity</b>   | <b>Annual Target</b>                      | <b>Quarterly Target</b>                    | <b>Quarterly Performance</b>  | <b>(B)RAG</b> |
| Use supervisors effectively   | A lead supervisors for the major advice topics debt, housing, benefit, employment | Supervisors all have lead areas           | Completed Q4                               | 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<br>Q2 – 2<br>Q3 – 2<br>Q4 - 3       | Q1- 6 total; 3 new trainees, 2 ongoing, 1 signed off as an adviser                            |               |
| Develop existing advisers   | Training and Development activities   | At least 12 existing advisers taking part | Q1 – 3<br>Q2 – 3<br>Q3 – 3<br>Q4 - 3       | Q1 – 25 attended face to face external training sessions plus in-house training & e-learning. |               |
| 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 | Q1 – Green status in Quality of Advice process  |               |

| <b>3) Make it easier to get advice</b>                                   |   |   |  |   |               |
|--|---|---|--|---|---------------|
| <b>Project</b>   | <b>Activity to make this happen</b>   | <b>Annual Target</b>  | <b>Quarterly Target</b>  | <b>Quarterly Performance</b>  | <b>(B)RAG</b> |
| 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.<br><br>Evaluate best use of resources to client demand | Q2: revert back to full opening for Bishop's Stortford<br>Q4: Evaluation completed and opening hours adjusted as necessary           | Completed Q2  |               |
| 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<br>Q2: Skype set up at Stortford once new broadband line installed  | Q1; Skype set up at Ware. Infrastructure in place at Bishop's Stortford   |               |
|  | Pilot Skype advice for general clients  | Skype being used for advice for 5 clients   | Q3 start using Skype for advice<br>Q4: 5 clients advised by Skype  | Completed Q2 and Q3   |               |
| 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<br>Q2: Communications team<br>Q3: Promotional activity starts<br>Q4: promotional activity ends | Q1: Communications and marketing place approved. Marketing activity focussed on Buntingford, Communication team met twice |               |

(B)RAG = Blue not started, Red behind, Amber on target, Green achieved

