

# Common Advice Performance Management Framework Summary 2017/18

## Midlothian Council



The Common Advice Performance Management Framework (CAPMF) has been developed in consultation with local authorities and other key stakeholders. It aims to measure key performance indicators for welfare and money advice services funded by local authorities on both an in-house and commissioned basis.

This is a summary of the key findings from the data returns for 2017/18 for the CAPMF for Midlothian Council.

This is the first year in which the data has been collected in relation to both welfare and money advice services. In the previous three iterations, covering 2014/15 through to 2016/17, the data covered money advice only. As such, trends will continue to be identified at both local and national levels for indicators concerning money advice, and future iterations will allow for the same in relation to welfare rights advice.

The information received from individual local authorities has been collated in order to produce a Scotland-wide analysis reflecting the significant impact of welfare and money advice services at a national level. This should be considered in conjunction with this local summary.

The key findings are detailed below:



Services, Investment and Volume			
Ref	Indicator	2017/18	Scotland 2017/18
C1	Number of services in the LA area	1	
	In-House		
	Money advice	0	5
	Welfare rights	1	12
	Combined	0	15
	External		
	Money advice	0	13
	Welfare rights	0	6
	Combined	2	66
	Case management system/s	Mosaic, CASTLE	-
I1	Number of FTE staff <sup>2</sup>		
	In-House	4	486
	External	1.8	386
	Number of Volunteer FTE staff		
	External	1.5	412
I2	Local Authority Funding		
	In-House	£141,223.31	£13.93m
	External	£243,380.80	£11.83m
	Other Sources of Funding		
	Scottish Legal Aid Board	-	£1,529,249
	Scottish Government	-	£257,467
	Big Lottery Fund	-	£44,759
	European Social Fund	-	£517,349
McMillan Trust	£22,617	£258,643	
A1	Volume		
	Contacts	7660	222,530
	Total Clients	4860	161,428
	New Clients	2557	94,336
	Contacts by channel		
	Face-to-face	4035	138,771
	Telephone	2134	72,999
Email <sup>3</sup>	623	15,948	
Web	0	2,051	
Webchat	0	0	

1 Internal: Midlothian Council Welfare Rights Team External: Dalkeith CAB; Penicuik CAB

2 Figures include partial data for Dalkeith CAB and Penicuik CAB

3 Emails include letters

Services, Investment and Volume				
Ref	Indicator	2017/18	Scotland 2017/18	
A1	Referrals			
	Self-referral	800	67,313	
	Local authority:			
	Housing	1	2,924	
	Social Services	86	6,933	
	Revenues	-	1,946	
	Employability	-	932	
	Other	64	14,060	
	Primary Health Care	592	11,179	
	Third Sector	551	4,679	
	Other	384	9,722	
	Open SNSIAP cases			
	Type I	-	3,959	
	Type II	-	27,117	
	Type III	-	7,505	
	Closed SNSIAP cases			
	Type I	-	9,796	
	Type II	-	33,046	
	Type III	-	4,877	
	First reason for contacting agency <sup>4</sup>			
	Benefit Overpayment	172	992	
	Council Tax arrears	299	1964	
	Credit, store and charge card debts	192	1767	
	Catalogue debts	71	492	
	PPI	11	106	
	Payday Loan /High cost credit	20	476	
	Unsecured personal loan	152	1026	
	Bank and Building society overdrafts	79	528	
	Mortgage arrears	30	515	
	Rent arrears	312	3069	
	Help with appealing welfare benefit decision	-	5433	
	Assistance with making initial benefit application	-	9467	
Sanctioned	-	317		
Benefits entitlement check	-	12162		
Issue relating to right to reside	5	185		
Seeking to access other funds (i.e. grants)	-	1415		
Other (Please specify)	223	11051		

Client Demographics <sup>5</sup>				
Ref	Demographic	Categories	2017/18	Scotland
C2	Sex	Male	981	54881
		Female	1608	68109
		Don't know	30	26648
	Age	0-15	21	673
		16-24	392	7735
		25-34	589	19714
		35-44	576	16381
		45-59	479	29144
		60-74	285	22774
		75+	106	13408
Not Recorded		152	29031	
Ethnicity	White	2153	87555	
	Any Mixed or Multiple Ethnic Groups	3	2073	
	Asian, Asian Scottish or Asian British	4	2038	
	African	1	401	
	Caribbean or Black	1	938	
	Other Ethnic Group	25	1305	
	Not Recorded	431	43064	
Disability or long-term condition	Yes	120	43318	
	No	141	41590	
	Not Recorded	32	16995	
Income	£6,000 or less	163	13678	
	£6,001-£10,000	415	12816	
	£10,001-£15,000	567	9983	
	£15,001-£20,000	278	5994	
	£20,001-£25,000	204	2769	
	£25,001-£30,000	102	1459	
	£30,001-£40,000	51	929	
	Over £40,000	35	501	
	Not Recorded	89	42990	
Economic Status	Self employed	109	1872	
	Employed full time	476	10569	
	Employed part time	411	8463	
	Looking after the home or family	109	4209	
	Permanently retired from work	92	11837	
	Unemployed and seeking work	230	8749	
	At school	-	751	
	In further / higher education	-	995	
	Gov't work or training scheme	-	99	
	Permanently sick or disabled	411	16387	
	Unable to work because of short-term illness or injury	-	14516	
	Other	6	3020	
	Don't know	66	54568	

5 Figures include Midlothian's Council's Welfare Rights Team only

Client Demographics <sup>5</sup>				
Ref	Demographic	Categories	2017/18	Scotland
C2	Housing Tenure	Owner occupied	383	13766
		Social rented	952	33282
		Private rented	274	9102
		Other	304	8037
		Don't know	56	39336
	Household Composition	Single adult (non-pensioner)	692	33285
		Single pensioner	24	2245
		Single parent (one or more children)	307	10532
		Family (two adults, and one or more children)	465	10097
		Adult family (two or more non-pensioners, and no children)	282	13333
		Older adult family (contains at least one pensioner)	18	4771
		Don't know	163	41346

Money Advice Indicators						
Ref	Indicator	2014/15	2015/16	2016/17	2017/18	Scotland 2017/18
C3 <sup>6</sup>	Amount of debt owed by client	£4,157,623.93	££1,729,500	£1,699,415.81	£1,533,387.67	£204m
	Benefit Overpayment	n/a	£90,996	£108,511.43	£114,579.76	£9.3m
	Council Tax Arrears	n/a	£143,100	£185,061.64	£208,954.54	£21.8m
	Utility Arrears	n/a	£65,846	£24,802.89	£48,264.40	£3.6m
	Credit, Store and Charge debts	n/a	£407,374	£517,743.50	£297,751.96	£39m
	Catalogue	n/a	£60,648	£40,798.78	£60,699.62	£4.4m
	Unsecured Personal Loan	n/a	£232,983	£398,269.09	£286,948.87	£30.1m
	Payday Loan High cost credit	n/a	£17,344	£63,207.08	£8,865.88	£4m
	Overdrafts	n/a	£96,669	£66,134.84	£33,419.40	£5.3m
	Mortgage arrears	n/a	£459,284	£134,042.47	£299,375.35	£30.4m
	Rent Arrears	n/a	£58,504	£60,446.95	£70,928.44	£9.4m
	Rent to own	n/a	£24,787	£36,696	-	£3m
	Others <sup>7</sup>	n/a	£71,965	£63,701.14	£103,599.45	£43.7m
OP1.1	Breakdown of debt strategy agreed with client <sup>8</sup>					
	Sequestration	49	29	7	23	1800
	Debt Arrangement Scheme	45	21	7	5	740
	Trust Deed	0	0	0	0	121
	Awaiting sequestration	0	10	8	20	276
	Token payments	12	21	35	27	1736
	Pro rata offers	7	29	31	28	2190
	Moratorium	0	1	2	2	411
	Debt written off	1	18	3	5	412
	Repayment plan	0	0	7	-	1752
	Nil Payments/Offer	n/a	2	2	1	593
	Consolidation Loan	n/a	0	0	-	41
	Mortgage to rent/Shared equity	n/a	4	2	2	67
Did not agree a debt strategy	n/a	41	0	7	2883	
Still awaiting outcome	207	28	47	30	1244	
Other: please specify	0	-	-	-	-	

6 Figures include Dalkeith CAB and Midlothian's Council's Welfare Rights Team only

7 Other includes social fund loan, child maintenance, HP/Car Finance and income tax debts.

8 Figures include partial data for Dalkeith CAB

Money Advice Indicators						
Ref	Indicator	2014/15	2015/16	2016/17	2017/18	Scotland 2017/18
OC1	Financial gain (relating to money advice) Verified Unverified	- -	- -	- -	£3,923,739.58 -	£317.7m £85.8m



Welfare Rights Advice Indicators			
Ref	Indicator	2017/18	Scotland 2017/18
OP2, OP3, OC1	Disability Living Allowance		
	No. claims	28	1,720
	No. awards made/maintained	28	1,259
	Financial gain from awards made/maintained	£170,033.45	£5,551,809
	No. Mandatory Reconsiderations (MRs)	2	271
	No. appeals	18	337
	No. MRs/appeals won	3	163
	No. MRs/appeals lost	9	137
	Financial gain from MRs/appeals	£5,339	£1,119,251
	Personal Independence Payment		
	No. claims	301	11,765
	No. awards made/maintained	284	7,837
	Financial gain from awards made/maintained	£2,149,658.86	£63,143,269
	No. Mandatory Reconsiderations (MRs)	67	2,457
	No. appeals	162	4,646
	No. MRs/appeals won	86	2,474
	No. MRs/appeals lost	32	1,516
	Financial gain from MRs/appeals	£564,986.69	£14,103,398
	Attendance Allowance		
	No. claims	111	5,158
	No. awards made/maintained	107	4,707
	Financial gain from awards made/maintained	£764,291.99	£18,330,956
	No. Mandatory Reconsiderations (MRs)	2	202
	No. appeals	2	45
	No. MRs/appeals won	1	65
	No. MRs/appeals lost	-	35
	Financial gain from MRs/appeals	£4,340.70	£584,332
	Severe Disablement Allowance		
No. claims	-	67	
No. awards made/maintained	2	5	
Financial gain from awards made/maintained	£5,074.03	£280,720	
No. Mandatory Reconsiderations (MRs)	-	10	
No. appeals	-	9	
No. MRs/appeals won	-	7	
No. MRs/appeals lost	-	1	
Financial gain from MRs/appeals	-	£78,313	
Industrial Injuries Disablement Benefit			
No. claims	-	53	
No. awards made/maintained	-	5	
Financial gain from awards made/maintained	-	£19,030	
No. Mandatory Reconsiderations (MRs)	-	18	
No. appeals	4	19	
No. MRs/appeals won	-	5	
No. MRs/appeals lost	-	10	
Financial gain from MRs/appeals	-	£12,878.81	

Welfare Rights Advice Indicators			
Ref	Indicator	2017/18	Scotland 2017/18
OP2, OP3, OC1	Carers Allowance		
	No. claims	13	1,395
	No. awards made/maintained	13	1,190
	Financial gain from awards made/maintained	£122,200.36	£2,888,922
	No. Mandatory Reconsiderations (MRs)	-	16
	No. appeals	-	5
	No. MRs/appeals won	-	6
	No. MRs/appeals lost	-	3
	Financial gain from MRs/appeals	-	£65,003
	Sure Start Maternity Grant		
	No. claims	-	40
	No. awards made/maintained	1	24
	Financial gain from awards made/maintained	£3,548	£40,148
	No. Mandatory Reconsiderations (MRs)	-	1
	No. appeals	-	1
	No. MRs/appeals won	-	0
	No. MRs/appeals lost	-	1
	Financial gain from MRs/appeals	-	£0
	Employment Support Allowance		
	No. claims	193	7,808
	No. awards made/maintained	173	4,853
	Financial gain from awards made/maintained	£1,276,985.04	£29,695,875
	No. Mandatory Reconsiderations (MRs)	35	2,788
	No. appeals	98	4,073
	No. MRs/appeals won	67	2,407
	No. MRs/appeals lost	21	1,204
	Financial gain from MRs/appeals	£237,358.26	£14,167,381
	Funeral Expenses		
No. claims	2	44	
No. awards made/maintained	2	30	
Financial gain from awards made/maintained	£5,775	£47,948	
No. Mandatory Reconsiderations (MRs)	-	4	
No. appeals	-	6	
No. MRs/appeals won	-	1	
No. MRs/appeals lost	-	0	
Financial gain from MRs/appeals	-	£584	
Scottish Welfare Fund			
No. claims	5	1,803	
No. awards made/maintained	10	1,280	
Financial gain from awards made/maintained	£2,383	£1,055,087	
No. Mandatory Reconsiderations (MRs)	-	58	
No. appeals	-	4	
No. MRs/appeals won	-	10	
No. MRs/appeals lost	-	11	
Financial gain from MRs/appeals	-	£10,237	

Welfare Rights Advice Indicators			
Ref	Indicator	2017/18	Scotland 2017/18
OP2, OP3, OC1	Cold Weather Payments and Winter Fuel Payments		
	No. claims	-	29
	No. awards made/maintained	-	20
	Financial gain from awards made/maintained	£200	£11,670
	No. Mandatory Reconsiderations (MRs)	-	1
	No. appeals	-	0
	No. MRs/appeals won	-	1
	No. MRs/appeals lost	-	0
	Financial gain from MRs/appeals	-	£200
	Discretionary Housing Payments		
	No. claims	22	915
	No. awards made/maintained	20	773
	Financial gain from awards made/maintained	£64,422.51	£796,242
	No. Mandatory Reconsiderations (MRs)	-	30
	No. appeals	-	4
	No. MRs/appeals won	-	3
	No. MRs/appeals lost	-	0
	Financial gain from MRs/appeals	-	£89,541
	Universal Credit		
	No. claims	42	1,541
	No. awards made/maintained	77	543
	Financial gain from awards made/maintained	£585,485.24	£2,460,408
	No. Mandatory Reconsiderations (MRs)	-	349
	No. appeals	1	78
	No. MRs/appeals won	-	36
	No. MRs/appeals lost	0	31
	Financial gain from MRs/appeals	-	£333,571
	Contributory Benefits		
No. claims	-	108	
No. awards made/maintained	-	230	
Financial gain from awards made/maintained	-	£1,194,341	
No. Mandatory Reconsiderations (MRs)	-	33	
No. appeals	-	17	
No. MRs/appeals won	-	10	
No. MRs/appeals lost	-	1	
Financial gain from MRs/appeal	-	£293,650	
Child Benefit			
No. claims	2	307	
No. awards made/maintained	11	237	
Financial gain from awards made/maintained	0	£36,397	
No. Mandatory Reconsiderations (MRs)	-	38	
No. appeals	-	10	
No. MRs/appeals won	-	4	
No. MRs/appeals lost	-	0	
Financial gain from MRs/appeals	-	£36,355	

Welfare Rights Advice Indicators			
Ref	Indicator	2017/18	Scotland 2017/18
OP2, OP3, OC1	Child Tax Credit		
	No. claims	4	600
	No. awards made/maintained	10	483
	Financial gain from awards made/maintained	£54,167.48	£2,823,786
	No. Mandatory Reconsiderations (MRs)	-	160
	No. appeals	-	31
	No. MRs/appeals won	-	28
	No. MRs/appeals lost	-	25
	Financial gain from MRs/appeals	-	£400,645
	Maternity Allowance		
	No. claims	-	39
	No. awards made/maintained	-	26
	Financial gain from awards made/maintained	£9,508.32	£162,140
	No. Mandatory Reconsiderations (MRs)	-	43
	No. appeals	-	10
	No. MRs/appeals won	-	0
	No. MRs/appeals lost	-	0
	Financial gain from MRs/appeals	-	£0
	State Pension		
	No. claims	-	220
	No. awards made/maintained	-	128
	Financial gain from awards made/maintained	-	£898,329
	No. Mandatory Reconsiderations (MRs)	1	2
	No. appeals	-	0
	No. MRs/appeals won	-	1
	No. MRs/appeals lost	-	0
	Financial gain from MRs/appeals	-	£77,576
	Pension Credit		
No. claims	38	1,594	
No. awards made/maintained	35	1,518	
Financial gain from awards made/maintained	£134,913.47	£5,688,937	
No. Mandatory Reconsiderations (MRs)	-	65	
No. appeals	-	10	
No. MRs/appeals won	-	24	
No. MRs/appeals lost	-	10	
Financial gain from MRs/appeals	-	£171,245	
Bereavement Benefits			
No. claims		124	
No. awards made/maintained	7	81	
Financial gain from awards made/maintained	6	£444,002	
No. Mandatory Reconsiderations (MRs)	£74,959.52	1	
No. appeals	-	3	
No. MRs/appeals won	-	0	
No. MRs/appeals lost	-	2	
Financial gain from MRs/appeals	-	£5,600	
		-	

<b>Welfare Rights Advice Indicators</b>			
<b>Ref</b>	<b>Indicator</b>	<b>2017/18</b>	<b>Scotland 2017/18</b>
	Other		
	No. claims	431	20,395
	No. awards made/maintained	17	14,264
	Financial gain from awards made/maintained	£530,395.95	£52,638,347
	No. Mandatory Reconsiderations (MRs)	2	1,115
	No. appeals	4	377
	No. MRs/appeals won	5	346
	No. MRs/appeals lost	-	134
	Financial gain from MRs/appeals	£13,867.54	£1,471,74

Softer Outcomes			
Ref	Indicator	2017/18	Scotland 2017/18
OC2	Number of service users self-reporting improved health and wellbeing as a direct result of getting advice/support from the service		
	I've been feeling more relaxed		
	Agree	-	1,154
	Disagree	-	0
	I've been feeling physically better		
	Agree	-	177
	Disagree	-	89
	I've been feeling better about myself		
	Agree	-	1,390
	Disagree	-	20
	I've been feeling more optimistic about the future		
	Agree	-	285
Disagree	-	15	
I've been getting on better with others			
Agree	-	185	
Disagree	-	10	
OC3	Number of service users self-reporting improved capacity and ability to cope as a direct result of getting advice/support from the service		
	I am thinking more clearly		
	Agree	-	295
	Disagree	-	5
	I feel more in control of my life		
	Agree	-	300
	Disagree	-	0
	I am more able to make decisions		
	Agree	-	1,277
	Disagree	-	14
	I am more able to cope with day to day issues/problems		
	Agree	-	281
Disagree	-	19	
I know when to seek support and where to get it			
Agree	-	433	
Disagree	-	0	

Softer Outcomes			
Ref	Indicator	2017/18	Scotland 2017/18
OC4	Number of service users self-reporting increased financial stability and resilience as a direct result of getting advice/ support from the service		
	I recognise when I need help to sort out my money		
	Agree	-	300
	Disagree	-	0
	I am confident that I am getting all the benefits/help to which I am legally entitled		
	Agree	-	294
	Disagree	-	16
	I know how much money I have to spend		
	Agree	-	290
	Disagree	-	10
	I can better manage my money		
	Agree	-	1,303
	Disagree	-	6
	I would be better able to cope if I had an unexpected expense		
Agree	-	147	
Disagree	-	17	