



Llywodraeth Cymru
Welsh Government

Grant Application Form

SINGLE ADVICE FUND

Please refer to the Guidance Notes when you are completing this application form.

Completed applications must be returned by 5pm on Thursday 17 October 2024.

Late applications will not be accepted.

Section One – What You Are Applying For

(Please note: A separate application form must be completed for each Service for which you are applying.)

Please tick ONE of the following only. This application relates to:

OPPORTUNITY 1: Regional Social Welfare Information and Advice Service

	Local Authorities Covered	Tick as applicable
1	Merthyr; RCT, Bridgend	
2	Carmarthenshire; Ceredigion; Pembrokeshire; Powys	
3	Conwy; Denbighshire; Flintshire; Gwynedd; Isle of Anglesey; Wrexham	
4	Blaenau Gwent; Caerphilly; Monmouthshire; Newport; Torfaen	
5	Cardiff; Vale of Glamorgan	
6	Neath Port Talbot; Swansea	

OPPORTUNITY 2: Pan-Wales Remote Advice Service

	Local Authorities Covered	Tick as applicable
7	National	

OPPORTUNITY 3: Standalone service – Regional Grant

	Local Authorities Covered	Tick as applicable
8	Please state which standalone region here <u>Cardiff and the Vale</u>	✓

Section Two – Organisation/ Lead Provider Details

Is this a collaborative or an individual application?

Please provide full contact details for your organisation. In a collaborative application (with delivery involving partner organisations), contact details of the Lead Organisation should be provided here.

This a collaborative application, working in partnership with many key partners who will provide access by referrals into the project and service. This however there is not a cost to this as the identification of service users to refer is an integral part of partnership organisations service as explain in application.

Section Three – Partner Organisations (Collaborative Applications Only)

If this is a collaborative application, please provide full contact details for the other organisation/s involved in this project who will receive grants funds.

No funding required by partners

Section Four – Quality Assurance

Each organisation who will be **directly delivering** the funded advice services through Opportunity 1 and Opportunity 2 is required to provide:

- a. evidence of the advice Quality Standard that they hold, **and** confirmation of the date at which their organisation will have to reapply for this advice Quality Standard; and
- b. a statement to confirm that they are **impartial** and have the ability to always **act in the best interest** of the people who will be receiving the free to client funded advice services.
- c. if a provider will be delivering **debt** advice services, evidence that they are Financial Conduct Authority (FCA) regulated, or confirmation that they are exempted from having to be FCA regulated.
- d. If applying for a grant through Opportunity 3, a provider does not have to hold an advice Quality Standard at the date of commencement of the funded services i.e. 01 April 2025. A successful Bidder will be expected to provide evidence that they are working towards this and that they will hold an appropriate Quality Standard within six-months of the date of the commencement of the funded service, i.e., 01 October 2025

Please confirm that you have attached the above evidence requested under a), b) and (if applicable) c) or d) above (for every organisation directly delivering within the application proposal).

Yes

If any directly delivering organisation does not currently hold either an advice Quality Standard or FCA authorised, please provide robust evidence here that these requirements will be met by the grant start date, or within 6 months if applying through Opportunity 3.

Section Five – Expected Start Date of Service Delivery

Please provide confirmation by ticking the box below that you (and your delivery partners in a collaborative application) will be able to commence the delivery of the free to client funded services on the 1 April 2025.

Yes, I can commence on the 1 April 2025.

☒

Section Six – About the Proposed Services

Please answer the below questions about the Service that you are proposing to deliver. Each question has a maximum word count and where a question will be scored, the relevant score weighting is set out after the question.

Question 1 – Prior Experience

Clearly set out the experience and proven ability of the provider(s) to deliver free to client social welfare rights-based information and advice services.

Provider(s) are also asked to explain their previous experience of involvement in collaborative service delivery models.

(Maximum of 1000 words) *Score maximum of 20 points.*

Experience and successful track record

Riverside Advice (RA) is Cardiff's longest-established, independent, specialist and trusted Advice organisation delivering social Welfare Rights-based services since 1975.

In 2004 RA became a single focus Charity and Company, providing innovative, bespoke, holistic, expert, and accessible Welfare Rights services, targeting the most vulnerable and hard-to-reach people.

Until 2013, when the UK Government took most of LA Social Welfare out-of-scope, RA had the largest Social Legal Aid Contract in Wales: 1500 Welfare Benefits/Debt Legal Aid cases annually. Since undertaking a Legal Aid Contract in category left 'in scope'; Housing and Welfare Benefits Upper Tribunals. The only organisation in Wales to have both Contracts.

RA accessible and holistic services equitably enhance quality-of-life, health and well-being for all, preventing and reducing poverty, deprivation and social exclusion; ensuring that hard-to-reach, with protect characteristics, and vulnerable can access Advice and support promptly.

Achieved by:

- delivering free, independent, impartial, confidential, holistic, expert and trusted Welfare Rights Advice: underpinned by facilitating holistic services which deliver the best outcomes
- designing person-centred bespoke trusted and accessible services tailored to individuals' needs, with partners, utilising early intervention/prevention principle
- targeting hard-to-reach, vulnerable and disabled people through collaborative partnership working with non-advice organisations for referrals to facilitate engagement and reduce 'barriers' and enhance access
- empowering people to move forward independently.

Last year RA delivered:

- 65 Tribunals with 96% success rate
- 55 successful DRO's and 5 Bankruptcy.

Multi-funding provide holistic services

Multi-funding enables RA to deliver holistic services across the Welfare Rights spectrum in Welfare Benefits, Debt, Housing, Fuel Debt, Energy Efficiency, financial literacy, Education and Employment. The majority of services across all-levels of complexity, to Court /Tribunal level. Bringing added value, providing accessible services for clients for inhouse referrals essential for best outcomes:

Funding includes;

- Health Board (since 2000: renewed until 2027) Welfare Benefits and Debt for people with Mental Health Illnesses
- Legal Aid Contracts (since 1997 renewed until 2025) Welfare Benefits Upper Tribunals and Housing
- Two British Gas Trust Grants (funded since 2011 renewed until 2026) WB, Debt, Energy Efficiency. Since 2020 second BGET project in Caerphilly and Newport
- Waterloo Foundation Grant (since 2011 renewed until 2027) Welfare Benefits for Carers

- [REDACTED]
 - [REDACTED]
 - National Energy Saving Trust and National Grid (since 2011, renewed until 2027):
 - ▶ Income Maximisation across Wales
- Other previous Contracts and Grants evidence range of services delivered:
- Legal Aid Generalist Advice Support Service Contract for South-East Wales
 - Welsh Assembly Specialist Advice casework in Welfare Benefits and Debt
 - DWP Pension Credit Take-up
 - Several large Big Lottery Grants for research, development, delivery of Bespoke Advice services
 - Lead on Cardiff City Centre Generalist Advice Service
 - Cardiff Council funded projects Open Door with Asian Languages, Carers, Families with Children Under-4
 - Projects from range of funders including, Children in Need, Lloyds, Comic Relief, First Utility,

Proven Ability and expertise

Legal Aid Specialist Quality Mark since 1997.

Riverside Advice registered:

- Debt Intermediary for DRO's
 - Financial Conduct Authority

Advisors highly qualified with many years' expertise in delivery and understanding specific needs of vulnerable. Including:

- Solicitor:
 - Authorised Litigator, meeting Legal Aid requirements.
 - Trainer authorised by the Solicitors Regulatory Authority.
 - Legal Aid approved supervisor and caseworker for Housing and Debt Contract.
 - FCA authorised Debt Intermediary authorised
 - Specialist Welfare Rights Advisor 12 years at Riverside Advice.
- Welfare Rights Casework Manager:
 - Legal Aid Welfare Benefits Legal Aid Supervisor,
 - Specialist Welfare Rights Advisor 20 years at Riverside Advice.

Access, outcomes and gains

Statistics, client profiles(detailed question 2), client-feedback demonstrate how innovative partnership, collaborative working provides accessible services which target vulnerable, most hard-to-reach people, who slip through-the-net of mainstream services.

Client Feedback demonstrates accessible services reduce barriers, key to improving people's health, wellbeing, saving lives:

- *Your help has given me a future I can live for, I had very bad Depression, couldn't cope anymore but with your help I don't need antidepressants and can look forward to each day not dreading waking up*
- *I suffer from severe anxiety and depression and was Suicidal over my debts before the DRO.*
- *You made a huge difference to mine and my family's life. Given me chance to get back on my feet get my bills in order and not get into Debt again, now have a quality of life not a stressful existence*

[REDACTED]

▶

▶

▶

[REDACTED]
[REDACTED]
[REDACTED]

Collaboration

Collaboration, partnership, innovation is core to RA. RA are only Advice organisation in area to design, target and deliver 'client centred' bespoke services through partnership working, increasing access and reduce barriers to meet the 'needs' of most vulnerable people across Wales.

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]

the funded service, demonstrating innovation in reaching people who may not usually access mainstream advice services.

- vii) contribute to and engage with the Regional Advice Network and any advice network partnerships established in their respective regions/nationally

If applying through Opportunity 3, Please explain and evidence how your proposed service delivery model will

- i) be seamless and fully integrated for people who have advice needs;
- ii) be focussed on both prevention and responding to emergency crises;
- iii) be designed to ensure people accessing information and advice services are given tangible opportunities to develop their knowledge, capability and skills with the aim of, as far as practical, improving their resilience to similar problems reoccurring;
- iv) able to reach into the heart of local communities, ensuring the funded services are well known and easily accessible
- v) target those people or groups whose characteristics or circumstances make them more likely to be in most need of advice and encourage early access by them to the funded service, demonstrating innovation in reaching people who may not usually access mainstream advice services.
- vi) contribute to and engage with the Regional Advice Network and any advice network partnerships established in their respective regions/nationally

(Maximum of 1500 words)

Score maximum of 25 points.

Core to RA is our innovative, unique and collaborative approach over last 25 years establishing 100+ referral partners from all sectors who work without cost.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

80% RA clients access through our referral process.

RA client profile demonstrates targeting success for vulnerable and hard-to-reach :

- 93% Mental Health illness
- 69% Physical illness
- 97% Disability
- 29% carers
- 32% Non-White
 - 16% Asian
 - 8% Black
 - 8% Mixed Race
- 21% English language/literacy difficulties
- Age
 - 22% 16-35
 - 22% 36-45
 - 19% 46-55
 - 22% 56-65
 - 15% 65+
- 91% of people scoring high on multiple deprivation index
- 97% living in geographical areas of high deprivation

RA's Welfare Rights provides significant improvements in clients health, mental health and wellbeing. Collaboration with key partners 4Winds Support critically enables those with most severe mental illness to stay engaged throughout our services ensuring matters are fully resolved. They offer emotional support and engagement on range of activities and courses to help with rehabilitation. 4Winds support and services have seen many start re-engaging with life and society. Their services are part of this proposal.

Our proposed delivery model incorporates both our collaborative working with partners and outreach services to target specific vulnerable and hard-to reach clients within Mental

Health. Incorporating RA's partnerships and outreach work, and building on our innovative work in Mental Health field

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Feedback Cardiff CMHT:

*RA offer trusted, bespoke services for service users. Many people RA see have multiple, complex needs. Individuals who would **not be able to engage with or be offered mainstream Advice Services** due to behaviours and presentations being misunderstood. These can lead to isolation and exclusion from mainstream community services –exacerbating the problems. Team at RA understand these needs and quickly generate effective trusting working relationships.*

*In my experience, RA is **the only Advice Service** who can quickly engage with these individuals, often at their lowest ebb of hope. RA has assisted some of our more seriously ill service users where mainstream Advice Services have failed.*

[REDACTED]

[REDACTED]

[REDACTED] Aligns with WG objectives, enabling provision of person-centred, seamless flexible service promoting resilience and prevents crises.

ii) Focus on Both Prevention and Emergency Crisis Response

[REDACTED]

[REDACTED]

- **Preventative Work:** [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

- **Crisis Response:** [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

iii) Empowering Clients to Build Knowledge, Capability, and Resilience

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
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[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

iv) Reaching into the Heart of Local Communities: Accessibility and Awareness

RA ensures services are accessible to most in need by publicity and partnership working.

[REDACTED]

[REDACTED]

[REDACTED]

Innovative outreach ensure services reach deep into local communities. Including:

- [REDACTED]
- [REDACTED]
- [REDACTED]

v) Targeting Vulnerable and Hard-to-Reach Groups: Innovation and Early Access

Targeted to reach vulnerable, hard-to-reach groups excluded from mainstream services at RA's core. Innovative methods to engage individuals:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

vi) Contributing to Regional Advice Network, National Partnerships

Advice Network

Provider since 1975 RA has comprehensive understanding of Sector: having key roles in coordination of Cardiff Advice Providers, and Legal Aid partnership. Engages on consultations on Welfare Rights in Wales and Nationally. Keen to contribute to RAN and NPAW

Question 3 – Service Planning and Co-ordination

If applying through Opportunity 1, Opportunity 2 or Opportunity 3, Please explain:

- i) the robustness of the planning assumptions used to predict the numbers accessing the proposed service/s, as set out in the Minimum Volume Expectations table in Question 6 below;
- ii) how the planning of the funded service will complement other advice services already operating within the service area;
- iii) how service delivery will be co-ordinated to ensure equal and consistent access to the funded service/s across the region or across Wales, as appropriate;

- iv) how the planning of the information and advice service will ensure the funded service will be delivered in accordance with the specific needs of local communities;
- v) how a system of review and innovation will drive forward continuous improvements in effectiveness and efficiency;

(Maximum of 1500 words) **Score maximum of 25 points.**

Robustness of the Planning Assumptions

The planning assumptions used to predict number of clients accessing RA's proposed services are based on extensive knowledge gathered over nearly 30 years of Advice provision, need and demand, a comprehensive analysis of local, regional, and national data sources developed using:

Historical Data: RA has a well-established record of service delivery across Cardiff and the Vale, with detailed data on client numbers, case types, and outcomes over the last 28 years. This historical data is key resource in predicting future demand. E.g., trends and changes in legislation in Welfare Benefits, Housing, Debt issues, and fluctuations due to the financial climate including the recent covid pandemic, the fuel crisis and cost of living, all assist in estimating the volume of clients requiring assistance.

- **Local Needs Analysis:** We incorporated data from the *Welsh Government's Social Welfare Needs Analysis* and local council reports to assess the socio-economic conditions and levels of deprivation across the region. This includes high-levels of demand for Welfare Benefit and Housing advice due to legislation changes, and the rise of personal debt due to economic changes.
- **Community Engagement:** We regularly engage with community stakeholders to deliver services and to understand evolving needs of local populations. Regular feedback from clients, partner organisations, and local authorities inform assumptions about service demand. E.g. increase in number of people experiencing homelessness or unemployment would lead us to predict higher demand for housing and employment advice.
- **Predictive Modelling:** In addition to historical data, we have employed predictive modelling techniques to forecast future demand for our services. This includes considering demographic shifts, such as the aging population, which may increase

demand for social care and welfare advice, and trends in economic conditions, such as inflation or changes in government policy impacting benefits.

Planning assumptions are therefore robust, grounded in empirical data, and reflective of local and regional realities. This ensures projected figures in the Minimum Volume Expectations table are realistic and achievable.

II) Complementing Other Advice Services in the Area

RA services are innovative, unique, targeting people, through extensive partnerships enabling us to provide access to deliver services to those people with protected characteristics, the vulnerable, hard to reach who often slip through the net of main-stream advice services.

RA is committed to working collaboratively with other advice agencies in Cardiff and the Vale, services complementing, rather than duplicating any other provision.

RA discussed our application with [REDACTED] who are submitting [REDACTED] agreeing a warm transfer/referral process, ensuring efficient and effective provide a seamlessly integrated wrap around service for target client group.

Partnerships and Referrals: Core to RA work and services is collaboration and partnerships. We have over 100 different referral partners from all sectors who enable us to target and provide access to the most vulnerable hard to reach. The partners often continue to assist their service users through our advice process to support and encourage engagement.

We have established strong relationships with other advice agencies, including [REDACTED]
[REDACTED] These services regularly refer the most vulnerable people with specific needs to our bespoke and holistic specialist Welfare Rights services.

By coordinating through referral pathways, this ensures clients receive the most appropriate advice at the correct place for their needs without duplication.

[illegible]

III) Coordinated Service Delivery for Equal and Consistent Access

Ensuring equal and consistent access to our services across Cardiff and the Vale is a priority. Our service delivery model is designed to be accessible, inclusive, and responsive, regardless of a client's location or background.

- [REDACTED]
- [REDACTED]

- [REDACTED]
- [REDACTED]

iv) Tailoring Services to the Specific Needs of Local Communities

RA committed to delivering services meet the unique needs of local communities. Our approach to service planning involves:

- [REDACTED]
- [REDACTED]
- [REDACTED]

v) Continuous Improvement through Review and Innovation

RA is committed to continuous improvement in both the effectiveness and efficiency of our service delivery. This is achieved through:

- [REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]

RA's service delivery model is based on robust planning assumptions, collaboration, and commitment to providing equal access to all. By continuously reviewing and innovating services, we remain responsive to needs of vulnerable people, local communities and high-quality delivery, effective advice meeting the objectives of the Welsh Government's Single Advice Fund. This approach guarantees our services are coordinated, inclusive, and adaptable to the diverse needs of Cardiff and the Vale.

Question 4 - Welsh Language and Community Languages

If applying through Opportunity 1, Opportunity 2 or Opportunity 3, Please clearly explain how your proposed service delivery model will ensure there will be consistent and equal access to people accessing funded services who wish to do so in the medium of Welsh, or in any of the community languages.

(Maximum of 500 words) **Score maximum of 5 points.**

To safeguard consistent and equal access for individuals wishing to access funded services in Welsh or community languages, RA has developed a [REDACTED]

[REDACTED] This approach aligns with the *Welsh Language (Wales) Measure 2011* and the *Well-being of Future Generations (Wales) Act 2015*, confirming linguistic needs are respected and accommodated.

1. Bilingual Services in Welsh and English

RA is committed to providing advice services in both Welsh and English, recognising the importance of language choice in accessing services. Our service delivery model includes:

- [REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

2. Services in Community Languages

Our commitment to Cardiff and the Vales diverse community is demonstrated in our provision and range of community languages, providing equal access for all clients, regardless of linguistic background. Our model includes:

- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

3. Digital Access and Language Support

[REDACTED]

- [REDACTED]
[REDACTED]
[REDACTED]
 - [REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Question 5 - Person-centred Services that Contribute to Wellbeing

If applying through Opportunity 1, Opportunity 2 or Opportunity 3, Welsh Government wishes to support advice services that offer services aligned to the Wellbeing of Future Generations Act 2015. Please highlight the ways in which your proposed service will constitute a person-centred service that will contribute to well-being, ensuring that you include reference to how the service will meet each of the following well-being goals:

1. A prosperous Wales
2. A resilient Wales
3. A healthier Wales
4. A more equal Wales
5. A Wales of cohesive communities
6. A Wales of vibrant culture and thriving Welsh language
7. A globally responsible Wales

(See Guidance for further information).

(Maximum of 750 words)

Score maximum of 10 points.

1. A Prosperous Wales

Riverside Advice (RA) helps create a prosperous Wales by ensuring access for the most vulnerable to financial support required to live stable, productive lives. Holistic services, including Welfare Benefits, Debt, and Housing advice, contribute directly to reducing poverty and financial hardship—key elements highlighted in the *Needs Analysis* as critical for fostering Welsh prosperity. By supporting clients in navigating complex Welfare systems and securing rights, we empower individuals to control their financial futures, contribute to economic resilience, whilst aligning to the Well-being of Future Generations Act's goal, of building a prosperous and economically balanced society.

2. A Resilient Wales

The *Future Generations Act* emphasises the importance of building individual and community resilience. RA's commitment to fostering resilience is providing

The *Needs Analysis* report, states housing and debt issues remain the most critical concerning areas across Wales. Addressing specialist Housing advice prevents homelessness whilst promoting stable living conditions, essential for building personal and community resilience. Our Debt advice equips clients with knowledge and tools to manage their finances sustainably, reducing long-term vulnerability and economic shocks.

3. A Healthier Wales

RA plays a key role in contributing to a healthier Wales by addressing the social determinants of health. The *Needs Analysis* identifies financial stress, housing insecurity, and unemployment as major contributors to poor mental and physical health outcomes. As reported to us by our clients our Advice directly alleviates these pressures, reducing stress and improving overall well-being. By securing Benefits and offering employment guidance, clients access the resources they need to lead healthier lives. Our housing advice ensures clients live in safe, secure environments, reducing the risk of health problems related to poor housing conditions.

A More Equal Wales

The *Well-being of Future Generations Act* and the *Single Advice Fund* guidance both emphasise the importance of creating a more equal society. RA's services address inequalities through collaborative partnership and outreach working to reach the marginalised, vulnerable individuals, including those experiencing discrimination. Social Welfare issues such as unemployment, discrimination, and housing insecurity disproportionately affect disadvantaged communities in Cardiff and the Vale. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

5. A Wales of Cohesive Communities

Our person-centred services contribute to well-being by addressing issues that threaten social stability; such as homelessness, debt, and unemployment. As the *Needs Analysis* highlights, housing insecurity and financial instability can lead to social fragmentation. RA works to keep families housed and financially stable, allowing them to remain active community members. Our approach ensures individuals can contribute and participate in their communities, fostering social cohesion. By offering expert advice and support, we help reduce social and economic divides that can fracture communities, aligning with the *Future Generations Act's* vision of cohesive, connected communities.

6. A Wales of Vibrant Culture and Thriving Welsh Language

RA is committed to promoting and supporting the Welsh language. [REDACTED]

[REDACTED] Therefore contributing to the preservation and growth of Welsh culture, supporting the *Future Generations Act*'s goal of fostering a Wales where culture and language thrive. RA reflects the cultural diversity of the communities we serve, ensuring our services are inclusive and respectful of all cultural backgrounds.

7. A Globally Responsible Wales

RA operates a strong ethical foundation, contributing to a globally responsible Wales by promoting sustainable and equitable practices. Our services encourage individuals to make informed choices benefiting not only themselves but also the wider community and environment. By providing debt management and employment advice, we support sustainable financial behaviours and fair working conditions, both of which are in line with global efforts to reduce inequality and promote sustainability. Furthermore, our work in housing supports ethical and sustainable housing solutions, ensuring our clients live in conditions that are not only secure but also environmentally responsible. This aligns with the *Well-being of Future Generations Act* in promoting global citizenship and sustainability.

RA services therefore meet the needs within the evidence-based approach of *Well-being of Future Generations Act*, *Single Advice Fund*, demonstrating we are the best choice for delivering advice services that enhance well-being and tackle social inequalities in the region.

Question 6 – Value for Money (Score maximum of 15 points.)

i) Minimum Volume Expectations:

If applying through Opportunity 1, Opportunity 2 or Opportunity 3, please use the tables below to provide the minimum number of enquiries and cases¹ by subject category and advice level that you expect to undertake across your service/s for each year of the grant funding period.

¹ See Guidance for the interpretation of 'enquiries and cases'.

Minimum Volume Expectations 2025 – 2026

Please indicate numbers of enquiries and cases by subject category and by advice level in the table below for the period 1 April 2025 to 31 March 2026.

	Information & Guidance Number of enquiries	Advice & Advice with Casework Number of enquiries	Advice & Advice with Casework Number of cases	Specialist Advice Number of enquiries	Specialist Advice Number of cases
Welfare Benefits	■		■		■
Debt	■		■		■
Housing	■		■		■
Employment					
Discrimination					
Education					
Totals:	■		■		■

Minimum Volume Expectations 2026 - 2027

Please indicate numbers of enquiries and cases by subject category and by advice level in the table below for the period 1 April 2026 to 31 March 2027.

	Information & Guidance Number of enquiries	Advice & Advice with Casework Number of enquiries	Advice & Advice with Casework Number of cases	Specialist Advice Number of enquiries	Specialist Advice Number of cases
Welfare Benefits	■		■		■
Debt	■		■		■
Housing	■		■		■
Employment					
Discrimination					
Education					
Totals:	■		■		■

Minimum Volume Expectations 2027 - 2028

Please indicate numbers of enquiries and cases by subject category and by advice level in the table below for the period 1 April 2027 to 31 March 2028.

	Information & Guidance Number of enquiries	Advice & Advice with Casework Number of enquiries	Advice & Advice with Casework Number of cases	Specialist Advice Number of enquiries	Specialist Advice Number of cases
Welfare Benefits	■		■		■
Debt	■		■		■
Housing	■		■		■
Employment					
Discrimination					
Education					
Totals:	■		■		■

II) Proposed Grant Expenditure:

Please see the Guidance for the maximum grant available per opportunity. Bidders are expected to put forward proposals that largely utilise the full amount of funding available for the funding opportunity that they are bidding for.

Please indicate below how much you are applying for over the financial years below:

2025/26 - ■

2026/27 - ■

2027/28 - ■

3 year Total: ■

Please complete the financial table below entering the expected spend profile by quarter.

£	Quarter 1 01 April 2025 – 30 June 2025	Quarter 2 1 July 2025 – 30 September 2025	Quarter 3 1 October 2025 – 31 December 2025	Quarter 4 1 January 2026 – 31 March 2026	Total
Expenditure Profile					

£	Quarter 1 01 April 2026 – 30 June 2026	Quarter 2 1 July 2026 – 30 September 2026	Quarter 3 1 October 2026 – 31 December 2026	Quarter 4 1 January 2027 – 31 March 2027	Total
Expenditure Profile					

£	Quarter 1 01 April 2027 – 30 June 2027	Quarter 2 1 July 2027 – 30 September 2027	Quarter 3 1 October 2027– 31 December 2027	Quarter 4 1 January 2028 – 31 March 2028	Total
Expenditure Profile			6		

Please complete the financial spreadsheet at Annex B, which can be requested by emailing AdviceNetworks@gov.wales, entering all anticipated financial requirements for the grant period. It is important that you include as much information as possible to clearly detail how you propose to use the funding you are seeking for the provision of the information and advice service over the grant period.

Please refer to the Application Guidance regarding unit costs, co-ordination costs, Management charges/Central costs, redundancy costs and expected savings where bidders secure more than one of the available opportunities.

iii) Outcome Expectations and Monitoring:

If applying for Opportunity 1, Opportunity 2 or Opportunity 3 Please detail the suggested performance measures that you will use for monitoring and reporting progress in relation to the service/s to be supported by this grant.

		[REDACTED] [REDACTED] [REDACTED] [REDACTED]	
[REDACTED] [REDACTED]	[REDACTED]	[REDACTED] [REDACTED] [REDACTED]	Ongoing throughout period
[REDACTED] [REDACTED]	[REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]	Ongoing throughout period
[REDACTED] [REDACTED]	[REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]	Ongoing throughout period
[REDACTED]	[REDACTED] [REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED]	Ongoing throughout period

a) Please explain how the performance measures above will demonstrate to the Welsh Government that the advice services you are delivering are attaining the objectives of the grant funding? (Maximum of 750 words)

RA's monitoring systems produce robust performance measures complying with funders and our SQM quality standard meets objectives of the Single Advice Fund.

RA is effective in achieving primary goals of the Single Advice Fund. This high-quality advice service helps individuals resolve issues and deliver long-term benefits for communities, and wider society

1. Outcome-Focused Service Delivery

- [REDACTED]
- [REDACTED]

- [REDACTED]
- [REDACTED]

2. Contribution to Well-being Goals

RA's structured performance measures demonstrate contribution to the seven goals *Well-being of Future Generations Act*:

- **A Prosperous Wales:** [REDACTED]
- **A Healthier Wales:** [REDACTED]
- A More Equal Wales:** [REDACTED]

3. Efficiency and Value for Money

Efficient, cost-effective services are essential for demonstrating value for money.

Performance measures assess efficiency of operations:

- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

4. Partnership and Collaboration

This is key to all RA work, ensuring provision of targeted services to the marginalised, those with protected characteristics, most vulnerable and hard-to-reach. The following metrics demonstrate our role as a collaborative, well-connected advice service:

- [REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

5. Innovation and Adaptation

Ability to innovate and adapting emerging needs is critical for achieving long-term outcomes. Tracking performance indicators demonstrate how RA is evolving to meet future challenges:

- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

These comprehensive performance measures, demonstrate delivery of high-quality, person-centred advice services meeting grant objectives. Focusing on outcomes, well-being contributions, efficiency, partnership, and innovation ensures we address immediate client needs whilst also contributing to the long-term well-being of individuals and communities in Cardiff and the Vale.

b) Please explain how your data capture/collating processes will ensure that there is a coordinated and accurate reporting on the key performance measures on a local, regional and, if applicable, national basis? (Maximum of 750 words)

RA Ensures accurate, coordinated reporting on key performance measures by implementing a robust data capture and collation system. This system is designed to align with the objectives of the Welsh Government's Single Advice Fund and the principles of the *Well-being of Future Generations Act 2015*. Data management processes enable effective service delivery, assess outcomes, and report performance in a timely, transparent manner. The following approach to key elements ensures reporting requirements are met.

1. Integrated Case Management System

At the core of our data capture and reporting processes is our Integrated Case Management System. This system allows us to collect, store, and manage data on every client interaction, from the initial point of contact to the resolution of the case. Key features of this system include:

- [REDACTED]
[REDACTED]
[REDACTED]

- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- **Secure and Confidential:** Client data is securely stored in compliance with data protection regulations (GDPR), ensuring confidentiality while allowing safe collation and sharing of anonymised data for reporting purposes.

2. Coordination of data collection

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

3. Performance Monitoring and Reporting Tools

Performance monitoring and reporting tools integrated within our case management system enable us to ensure timely and accurate reporting:

- [REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

- [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

4. Quality Assurance and Data Accuracy

To ensure data accuracy, our multi-layered quality assurance processes include:

- **Regular Audits:** Casework management conduct regular audits checking for discrepancies in data entry. This ensures that the data we collect is accurate and reliable.
- **Cross-checking Mechanisms:** Our system includes cross-checking mechanisms that flag inconsistencies or missing data. Advisors are prompted to complete all fields, and supervisors review data, before final submission for reporting.
- **Client Feedback Integration:** We also incorporate client feedback into our data capture process. Client satisfaction surveys and follow-up consultations provide an additional layer of data that verifies the accuracy of our service outcomes and ensure the advice provided has a meaningful impact on clients' lives.

5. Collaboration and Data Sharing

Collaboration is key to ensuring our data is meaningful and contributes to a broader understanding of social welfare needs across Wales. RA works closely with partner organisations such as [REDACTED] and other stakeholders to share anonymised data and insights. [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

c) Please tick to confirm that, should you receive funding, you will work with the Welsh Government to jointly develop and agree additional performance measures, if requested?

I agree

☒

Section Seven - General Data Protection Regulations (GDPR)

Please tick the personal data items that will be processed and complete the GDPR declaration at Annex A.

Section Eight – Declaration/Certification

1. Please confirm that your organisation has a partnership agreement with other organisations involved in this project. You may be asked to submit this if your application is successful.

No N/A delete as appropriate

2. Please sign and date the application.

In a collaborative application, this must be signed by the Lead Organisation.

Declaration/Certification

Signature:



Name: Barbara Kerridge

Position: CEO

Date: 17.10.24

I confirm that the information given above is accurate and if this is a collaborative bid, I am signing as the lead body on behalf of the bid partners who have delegated authority for me to do so under the partnership agreement/s for the proposed project.

Notes

Submission of the application

The deadline for submission of electronic applications is **5pm on Thursday 17 October 2024**.

The deadline for submission of any questions regarding this grant opportunity is 5pm on Thursday 22 August 2024.

- An electronic copy of the completed application form and any questions should be emailed to AdviceNetworks@gov.wales
- Electronic applications should be presented in PDF or Microsoft WORD format. Arial and size 12 font should be used. Black print should be used.
- Your application should include:
 - 1) Evidence to support Section Four (Quality Assurance) for each provider.
 - 2) A signed declaration at Section Eight.
 - 3) Completed Annex A (GDPR data fields collected and declaration).
 - 4) Completed financial spreadsheet at Annex B
 - 5) An organogram/structure diagram for the project, highlighting the number of dedicated Full-time Equivalent (FTE) staff supported by this grant, including their function (i.e. generalist debt advice, specialist housing adviser, manager, admin etc.)
 - 6) Templates outlining the job descriptions and essential elements of the person specifications for any posts involved in the delivery of the funded service to include, but not limited to, (a) administrative staff (b) advice support staff (c) advisers (d) technical supervisors (e) advice managers (f) consortium co-ordinators

It is a principle of the grant that the grant funds pay for **additional activities** that would otherwise not occur if the grant were not paid. The organogram should indicate whether positions are occupied by staff who are already employed or whether they are to be recruited. If they are existing members of a provider's staff and they are currently funded by a different funding source, this must be clearly explained, making clear which funding the staff member will be moving from, to ensure there is no duplication or double counting of funding. If a staff member is to be shared across more than one of the available funding opportunities, the organogram should make clear what proportion of the staff member is being allocated to which particular service.

Please do not send any other additional information as this will not be assessed. Please do not include personal data, such as staff names.

Please note that applications that do not meet all of the above submission criteria will be rejected.

Annex A**General Data Protection Regulations (GDPR)**

Please tick the personal data items that will be processed:

(To check boxes, right click on the box, choose Properties and mark the Default value as Checked.)

Personal	☒ Name	☒ Telephone Numbers	
	☒ Home Address	☒ Date of Birth	
	☒ Business Address	☒ Driving Licence Number	
	☒ Postcode	☒ Passport / ID Card Number	
	☒ Email Addresses	☐ Photographs / images (which could be used to identify an individual)	
	☒ unique identifying number e.g. store loyalty card, library card etc	☐ Other (please specify)	
Sensitive*	☒ Racial / Ethnic Origins	☐ Biometric data e.g. DNA, finger-prints	
	☐ Political opinions	☒ Personal financial information (e.g. bank or credit card details)	
	☐ Religious beliefs	☐ Mother's maiden name	
	☐ Trade Union membership	☒ NI Number (or equivalent)	
	☒ Physical / mental health or condition	☒ Tax, benefits or pensions records	
	☐ Sexual life	☒ Health or social service records e.g. Housing or Child Protection	
	☒ Criminal & court records (inc. alleged offences)	☒ Employment records (inc. self-employment and voluntary work)	
	☐ Educational records	☐ Other (please specify)	

General Data Protection Regulations (GDPR) Cont'd.

We, the applicant, confirm our understanding, acceptance and compliance with, the following conditions:

- All awards of grant funding must be compliant with the General Data Protection Regulations (GDPR).
- All personal information collected and held by a funded provider will need to be treated in line with the GDPR regulations.
- Carrying out the Purposes of this grant will require a funded provider to process personal data on behalf of the Welsh Government.
- The Welsh Government will be the Data Controller and the successful provider(s) will be the data processor.
- As a data processor, a provider(s) must only ask for data that is necessary and relevant to the purpose of this project, and must only collect data when there is a specific, lawful reason to do so.

GDPR Declaration

Signature 

Name: Barbara Kerridge

Position: CEO

Date: 17.10.24

I confirm that the information given above is accurate and if this is a collaborative bid I am signing as the lead body on behalf of the bid partners who have delegated authority for me to do so under the partnership agreement for the proposed project.