

CORPORATE AND ENVIRONMENTAL OVERVIEW AND SCRUTINY COMMITTEE – PROJECT PLAN

Title: **FINANCIAL INCLUSION STRATEGY**

MEMBERSHIP:

Chairman: Councillor C Coughlan Vice-Chairman: Councillor C Dereli

Councillors: A Blundell, M Blake, S Currie, J Finch, N Furey, J Gordon, S Gregson, K Mitchell, P O' Neill,

TERMS OF REFERENCE

1. To undertake a review entitled 'Financial Inclusion Strategy'.
2. To review and update the 'Council Tenants Financial Inclusion Strategy 2015-2018' and consider extending the Strategy to all Residents of the Borough.
3. To present a report of the Committee's findings together with a Draft 'Financial Inclusion Strategy' to Cabinet and Council, as appropriate.

OBJECTIVES

The present –

To understand the existing arrangements in place and the current 'Council Tenants Financial Inclusion Strategy 2015-2018'.

The future –

To create an inclusive 'Financial Inclusion Strategy'

- A. To Compliment and Strengthen the Council Tenants Financial Inclusion Strategy
- B. To provide mechanisms for the early Identification of Vulnerable Tenants through provision of Council Tax Support Pack/ Literature / Signposting
- C. To signpost and provide Information for Residents and Tenants on Mental Health Support available
- D. To explore the Citizens Advice Bureau's - Appointment waiting time
- E. Future Resources for maintaining / safeguarding of the Money Advisory Post/s
- F. Provision of Supportive Debt Recovery

Comparison
LA – CT
Lancaster (Financial Inclusion)
Wigan (One stop shops Hubs)

Resources -

- The Council’s Corporate Director of Transformation & Resources will provide technical support and guidance, together with Officers from across the Authority, including Legal Services, Income and Inclusion, to be consulted as appropriate.
- External contribution, as appropriate.
- Any funding requirements will be included in the final recommendations of the Committee.

INFORMATION

(Web addresses are useful here)
<https://www.able-futures.co.uk/>
 Literature Support Packs
 Strategies
 CAB Statistics/Data
 MA Post details

Witnesses

Who?	Why?	How?
Representative/s from Income and Inclusion	To gain an insight into their experience of delivering a Financial Inclusion Strategy.	<u>Attendance at a meeting and presentation of information.</u>
Others stakeholders that may be identified during the course of the review.	To provide further information to assist in developing the Financial Inclusion Strategy	<u>Attendance at a meeting, if appropriate or presentation of information.</u>

Site Visits

Where?	Why?
N/A	

ESTABLISH WAYS OF WORKING

Officer Support

Lead Officer - Chris Twomey, Corporate Director of Transformation & Resources
Scrutiny Support Officer – Julia Brown, Member Services Officer
Legal Officer – Adam Spicer, Assistant Solicitor

Income and Inclusion – Jane Maguire, Income and Financial Inclusion Manager
Carl Wallace, Financial Inclusion Team Leader
Caroline Robinson, Health Strategy Manager

Reporting Arrangements

The Corporate and Environmental Overview and Scrutiny Committee to submit its final report and recommendations to Cabinet and Council January/February 2021.

DRAFT

TIME SCALES

Meeting 1 – 5 December 2019

- Introduction of the topic from the Corporate Director of Transformation & Resources
- To consider a presentation, on behalf of the Corporate Director of Place and Community to present the current position.
- Review confirmed to commence.
- To agree the Project Plan

Meeting 2 – 5 March 2020

- To agree and review the Project Plan
- (Information /data requested at previous meeting to be presented – Carl Wallace to present key priorities-possible actions to support the review)

Meeting 3 – 11 June 2020

- Presentation – Financial Inclusion Team

Stakeholder Workshops- August 2020/September 2020

Meeting 4 – 17 September 2020

- To receive feedback from Stakeholder Workshops

25 November 2020 - Meeting with Members of the Committee

- To look at any final aspects of the Financial Inclusion review and the updated Draft 'Financial Inclusion Strategy' prior to the meeting on 10 December 2020.

Meeting 5 – 10 December 2020

- To consider any final aspects of the review and the updated Draft 'Financial Inclusion Strategy'.
- To agree the draft final review report together with the revised ' Financial Inclusion Review Strategy' and recommendations for submission to Cabinet and Council, if applicable in January/February 2021.

Cabinet – 12 January 2021

- Submission of final report.

Council – 24 February 2021

- To receive the final report (if required).

INFORMATION GATHERED

5 December 2019

Presentation of the 'Council Tenants Financial Inclusion Strategy 2015-2018' – Carl Wallace – Financial Inclusion Team Leader

5 March 2020

Presentation of the ' Key Priorities / Actions' - Carl Wallace – Financial Inclusion Team Leader

11 June 2020	Presentation of the 'Financial Impact on Residents through Covid19' – Jane Maguire / Carl Wallace – Financial Inclusion Team.
August 2020	Virtual Stakeholder Sessions.
9 September 2020	Financial Inclusion Strategy - Feedback Session of the Citizen and Stakeholder Meetings.
17 September 2020	Financial Inclusion Strategy - Feedback to Members of the Committee of the Citizen and Stakeholder Meetings.
25 November 2020	Meeting with Members of the Committee to look at any final aspects of the Financial Inclusion review and the updated Draft 'Financial Inclusion Strategy' prior to the meeting on 10 December 2020.
OTHER	
RECOMMENDATIONS	
REVIEW DATE – If completed in the timescales indicated, March / June 2021.	