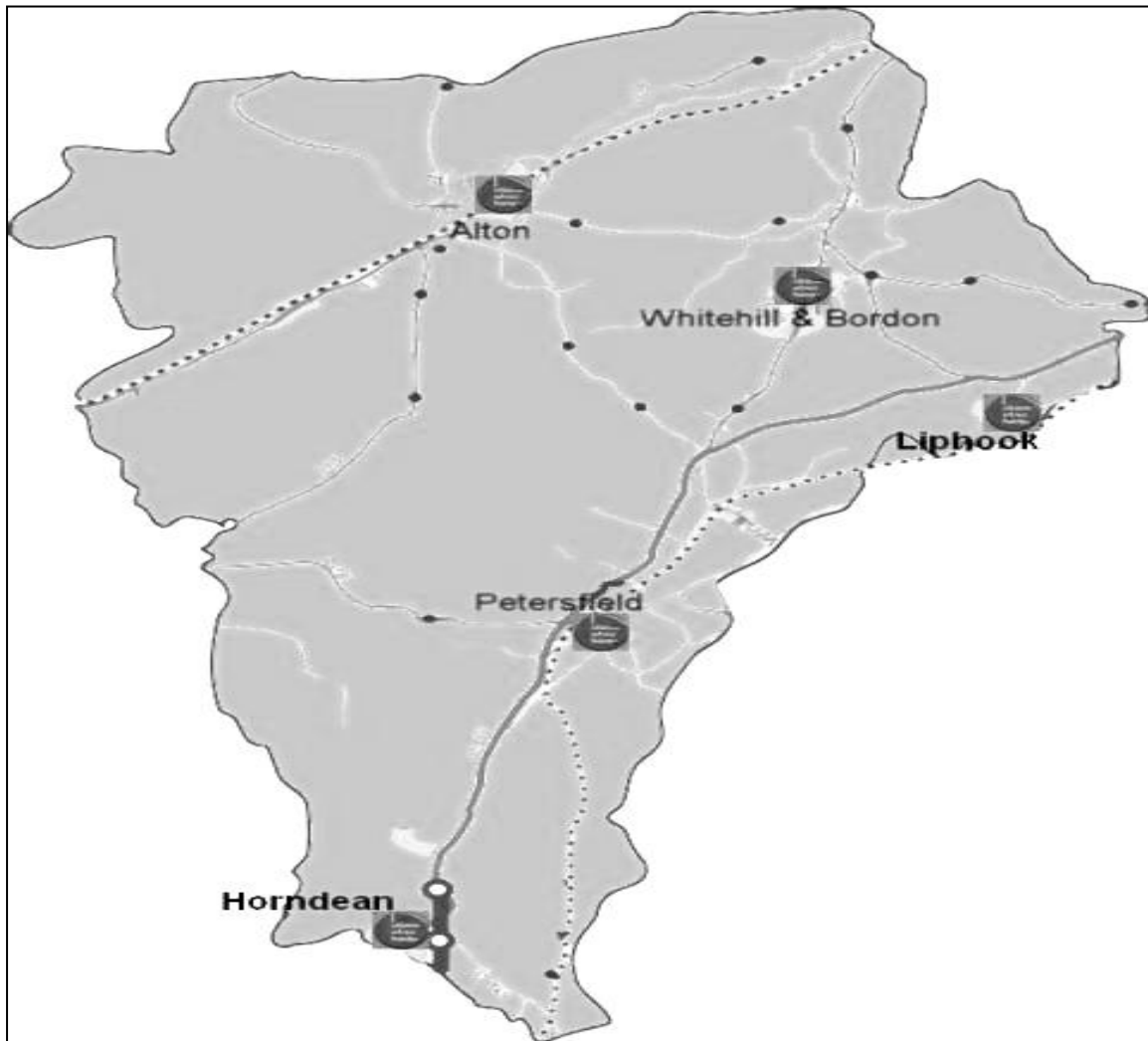


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your community



East Hampshire Citizens Advice Bureau



Annual Report - 2013/14

CHAIRMANS REPORT

I would like to start this annual report by recognising and thanking all of those who continue to make it possible for us to run a highly valued local advice service - Jon and his team of volunteers, staff and of course the trustees as well as our long term partners and funders; East Hants District Council along with the Town and Parish Councils. We could not continue without you so a BIG thank-you.

This AGM marks four years since we established the East Hampshire CAB by merging the Alton, Petersfield, Whitehill & Bordon bureaux. It seems a lot longer and we have come a long way in that time. Not without a few problems but we have dealt with most of them!

As I reported last year, office space continues to be an issue for us. I wish that I could announce more immediate solutions, but that is not the nature of the beast. Alton is still not ideal in terms of disabled access but remains our best current option; although we continue to keep our ears and eyes open! In terms of the Petersfield office, we are in current discussion with the landlords to agree a plan of work to renovate and improve the building. Hopefully this will occur during the coming months.

Last year, working with Havant, we initiated a shared CEO approach that has proved to be very effective; both Boards of Trustees are very happy to continue this arrangement.

The 2020 Lottery funded project is now underway with Natalie in place as project manager. With our partners we look forward to developing more effective ways for us all collectively to deliver service in the future. During the year we also attracted further projects, specifically Healthwatch and Advice-line. Having a range of projects, in addition to our core service, helps us by contributing to overheads and providing opportunities to staff and volunteers.

I won't dwell on the financial position save to repeat that we continually struggle to generate sufficient funds to cover our operations, but changes in how we operate and other efficiencies have enabled us to run a reasonably balanced ship once more. We are always looking for new ways to generate money and greatly appreciate the donations, especially from individuals, that come to us. It shows that we are appreciated.

The past year had its share of challenges (as usual), some of the highlights being power outages, roof leaks, phone system reliability and of course the arrival of Petra. Despite extensive preparations and training this new service management system has not proved to be as robust as required!

The manner in which we provide advice to our clients continues to evolve, with fewer clients in the office, but with more complex issues and more clients using self-help and telephone or internet based solutions. As pioneers of Advice-line, we are now providing consulting support to other Hampshire Bureaux as this telephone service is extended. Early in 2014 we underwent our Citizens Advice audits and we were judged to be fully compliant on the Organisational Audit and successfully passed the Quality of Advice Assessment.

The year ahead will have its challenges no doubt, but I am confident that our organisation will be able to address them and continue to provide an excellent local advice service.

Phil Ladds, Chairman

SERVICE DELIVERY REPORT

Our teams continue to be busy with a high number of drop in and telephone enquiries. There is a continuing trend for the CAB to get more complex and challenging enquiries as many more people try to use the internet to answer their problems turning to us only where simple answers do not work. This leads to an issue with our statistics where a simplistic look at the number of clients seen nationally shows a reduction, whilst in reality the bureaux workload is increasing.

We still get a few simple questions where giving an address or pointing the client to a resource is sufficient to allow them to manage their own problem but increasingly we need to give more information within the initial gateway interview or offer a full advice appointment. We have developed a policy of training new volunteers as gateway assessors first and once those skills are established training them as full advisers allowing us to operate a flexible service where clients can get the help they need quickly and flexibly.

All advice at East Hants CAB is given by volunteers and this year we have moved to using volunteer supervisors at Petersfield as we have a skilled team of senior volunteers who are generous in offering their time and experience. This change taken with a re-evaluation of the Service Delivery Manager and Office Manager role gives a robust future-proof structure we plan to introduce at the two other offices.

The main challenge for the bureau team was the change in the computer system used to record all our work. Our main IT systems are provided by Citizens Advice who needed to replace their CASE system with a more up to date product called Petra. As with many IT infrastructure projects this has caused significant problems with both performance and usability of the new system. Our volunteers had to forget all we had taught them about CASE and learn a new complex system most of them only use once a week on their 'bureau day'. Inevitably there have been issues and we had to close the bureaux while we trained everybody but as we were scheduled to make the change at the end of August 2013 it was during one of our quieter periods.

Petra does offer advantages to the service particularly in terms of reporting however the advantages to the adviser recording information are much less and we have to thank our volunteers for their forbearance and humour. We would have been lost without the tireless efforts of the team of staff and volunteers who supported our users sorting problems with a smile.

Our advisers continue to help clients with a huge range of problems not least of which revolve around the tightening of the benefits system. This year introduced the spare room subsidy or 'bedroom tax' where tenants in social housing had their housing benefit reduced where they were judged to be under occupying their property. In practical terms the shortage of social housing in East Hampshire means they cannot easily relocate to a smaller house. Whatever the views on the correctness of the policy change it has caused local families worry and debt. We are still working through the implications of that change.

We had been gearing up to support the introduction of universal credit which is now unlikely to be applied in our area much before 2017. This has not meant our clients have been insulated from change as the Job Centre Plus offices are applying the sanction rules strictly stopping benefits for many people. This has involved our offices in having to refer increasing number of people to the local food banks and charities and we thank those organisations for their support. This was compounded with the changes to the social fund which previously

made loans and grants to benefit claimants. The new local arrangements were meant to be more flexible, but in reality more people are becoming reliant on local charities.

It is not all gloom and doom as in many cases we have been able to assist people to very positive outcomes whether by getting a fair settlement of an employment case, forgiveness of unaffordable debt through a debt relief order or persistence in getting a good result from a utility provider who had been impossible to contact by the client.

Our advisers' chief tool is polite persistence backed up by knowledge of the system. Many providers do give us access to their specialist teams but in far too many cases we have to use the same public front doors that customers use, listening to endless messages telling us that our call is important whilst not of course answering it. We are beholden to our three bureaux volunteer teams that they do this voluntarily with good grace and humour without them we would be nothing. Fortunately, around fifteen to twenty local people join us each year and once with us most people stay a long time developing their skills and knowledge meaning we have the experience within our team to tackle nearly anything!

Chris Eele, Service Delivery Manager (Quality)

ADVICE-LINE PHONE SERVICE REPORT

Hampshire Advice-line service is growing from strength to strength as more bureaux have joined the group. With the New Forest and Winchester districts joining, there are now eight bureaux operating Advice-line out of seventeen offices. Hart district will join the group in October followed shortly afterwards by Maidenhead and Windsor.

By working together we can ensure we have enough assessors logged on to take our clients' calls. We were delighted to record our first 100% response rate recently. Our bureaux colleagues are consistently achieving call demand response rates of between 80% and 98% during peak hours. The response rate tends to fall away during the afternoon and we are working to improve this. It's all down to the commitment and goodwill of bureaux across the county.

During September we changed over to 03 numbers which critically reduces the cost of the call. Citizens Advice are testing developments of a national phone service and Hampshire clients calling Advice-line are now able to access the national service even if local bureaux cannot take their call.

Chris Greenslade, Operations Manager

SOCIAL POLICY REPORT

The dedicated coordinators in each office continue to support the volunteers with raising policy issues that our clients face on a day to day basis. It has been a difficult year though, with a new recording system, the loss of several coordinators and a general lack of resources to fully take on social policy work, but this said we were commended in a recent audit of our social policy work.

Social policy is the twin aim of the CAB service, but is often the most under resourced. With advisers and gateway assessors having to focus on helping clients with what are quite often complex cases, by the time they have written up their casework, there is often little time to

write up the social policy issue. Some of the offices have overcome this with a brief form the adviser can complete, enabling the social policy coordinator to pick this up at a later date.

Benefits continue to be a huge issue for our clients, particularly in the mental health area. Clients feel unable to attend the medicals demanded as part of the ESA process and there has been an increase in sanctions or benefit payments being stopped for non-attendance of appointments. The knock on effect is dramatic as clients have no income and this increases the strain on their mental health.

One client in Bordon received a sanction on his JSA because he failed to attend an interview for voluntary work, some fifteen miles away. Public transport from Bordon to where he had to go is very poor. The adviser calculated that client would have needed to spend three hours on four buses travelling to get there! It is difficult to see how clients can help themselves in these circumstances.

Social policy reports are being sent to our local MP, Damian Hinds and it is planned that the social policy committee will become more active and better resourced in the coming year, so that important more proactive social policy work can be undertaken.

Julie Frost, Service Delivery Manager (Social Policy)

2020 VISION FOR ADVICE PROJECT REPORT

The 2020 Vision for Advice project is now well underway and is picking up speed. The project manager and research team are in place and all are working hard to progress the project. In early September, an intensive six week period of vital survey work will gather previously unrecorded intelligence about clients. We expect to capture information that is vital to our understanding of the services we offer and the client experience of advice received from us and our partners. We are also undertaking some research work to better understand the communities we serve. By November, we will have completed the first phase of this and we will have an increased understanding of local communities which, combined with new information about our clients, will place us well to consider the future vision for advice. Working closely with partners we hope to redesign advice services: making sure that the client is at the centre of any service and ensuring that the service works best for the people who need it most. The opportunity is exciting and we are adopting a 'blank sheet of paper' approach. There are no pre-conceived ideas, but a genuine appetite to ensure that the client receives the best possible and most appropriate service.

The project also continues to support in-bureaux improvements: new websites for East Hampshire and Havant bureaux for instance, will encourage clients to 'self-help' and will provide up-to-date and local information. We have recruited welfare right champions, whose role will be to increase advice capability within our teams and also to undertake home visits to particular clients in need. We are developing the training we are able to offer staff and volunteers and are participating in the creation of a training assessment centre: an exciting venture in which we are partnering with Winchester CAB and Community First HEH. We also continue to work across Hampshire, learning from other bureaux and their lottery funded Advice Service Transition Fund projects.

We are really pleased with project progress: we have support from our key partners who are actively engaged. The project is being energetically driven and we are looking forward to the coming months as we progress.

Natalie Webb, 2020 Project Manager

TRAINING AND DEVELOPMENT REPORT

The year has seen some significant changes in our training provision. Julie Frost moved into providing service delivery at the Bordon office and in January 2014, Gill Ormond took on responsibility for training and development across the district.

Significant training resource was required, both during July and August 2014 and since, to support the implementation of the new Petra client records system.

We have been working closely with Sue Dewey, and independent training consultant, to undertake a complete review of the way in which we deliver our gateway assessor and adviser training programs. We piloted a new methodology in January 2014 which included for the first time the training of twenty mentors. Since then we have recruited and trained fourteen new gateway assessors. A new adviser training program is due to start this autumn which will see thirteen gateway assessors make the leap to full adviser work.

Volunteers have become increasingly involved in supporting the training function, particularly in sharing their experience and expertise with new volunteers. We are currently planning for around six staff and volunteers to undertake 'train-the-trainer' training. This will significantly enhance our capacity to deliver training in-house.

In addition, we have implemented a program of supervisor and receptionist training, which although in their early stages, is proving helpful to these roles. In response to the recent audit action plan, we have arranged six benefits training sessions, all of which are currently oversubscribed, and more are being planned, in partnership with Surrey Welfare Rights.

Gill Ormond, Service Delivery Manager (Training and Development)

A CLIENT STORY

One very dreary Friday, I was called upon to carry out a gateway for a client. He told me he was to attend his Father's funeral that day. My first thought, was why was he here, instead of supporting his family in preparation for the funeral? I couldn't imagine what had brought this client out on this wet, miserable day, when his emotions must be running very high. I remembered all the things one faces upon a death in the family, and I admired the client for being here.

I began by introducing the gateway process and I asked him what had brought him here today, he said "Inheritance tax". We looked at Advice-guide information together and it soon became clear that his father's estate would not be affected by Inheritance tax, but something made me think that there was more on this client's mind.

I could have so easily stopped the interview at this point, but something made me ask if there were any other issues, troubling him. He began saying something about his Mum and then he burst in to tears. He was worried about how his Mum would cope financially, with everyday living and how was she to pay for the funeral, to be held later? He had no idea of the benefits that may be available to his Mum, now she was on her own. It appeared to me that the whole family were dependant on my client, while he struggled to cope with his Father's funeral and he didn't know where to turn.

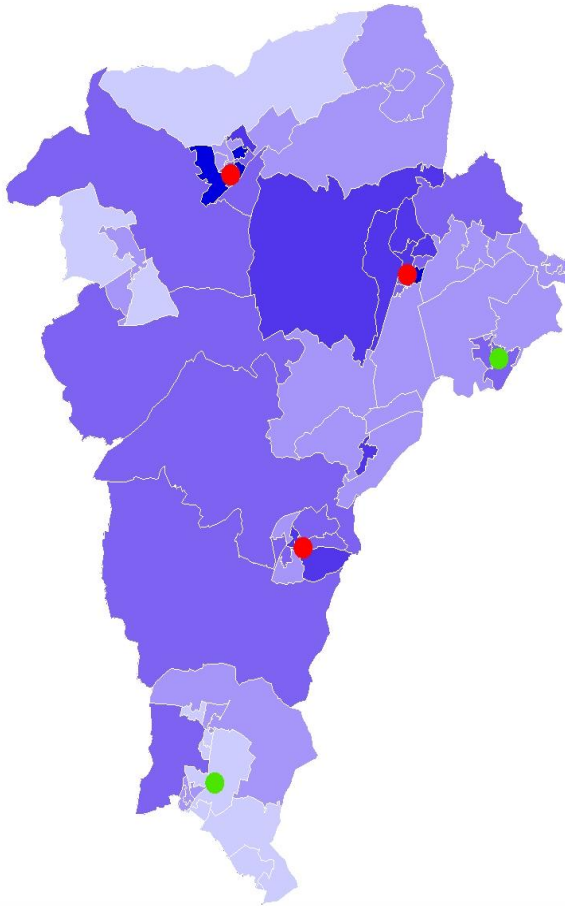
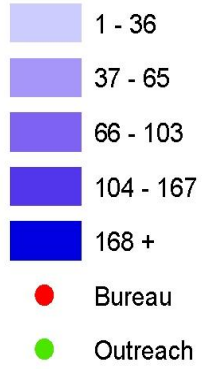
Together we looked up more information on Advice-guide and we found all the benefits that his Mum would be able to claim; now she would be a single person. There would be council tax discounts available and a payment from the social fund for funeral costs.

At the end of the interview, the client took my hand and thanked me, not for the information I had given him, but for 'just being here'. I felt touched by this comment and he had made feel that my volunteering was all worthwhile.

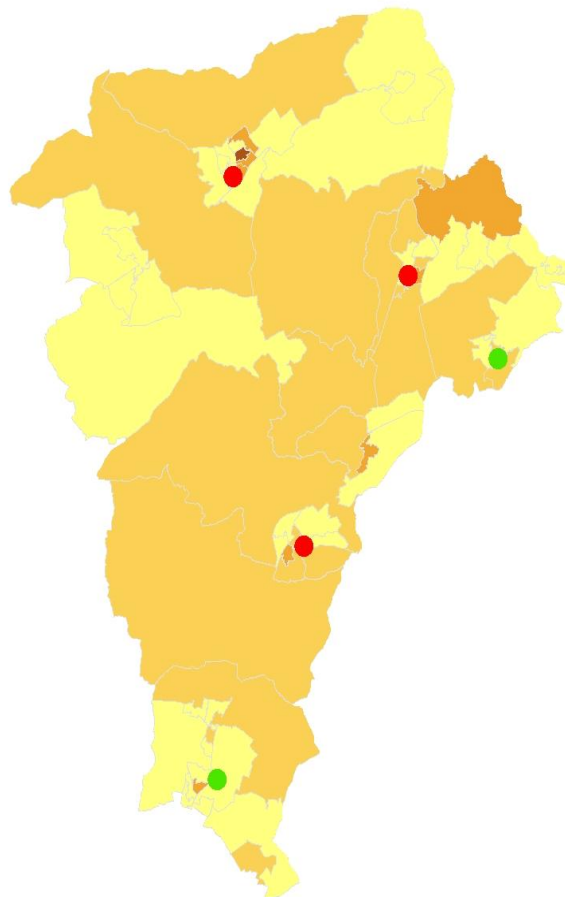
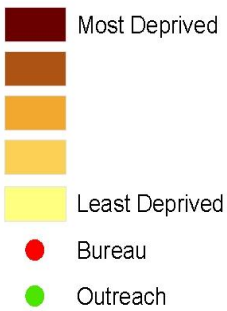
One of our invaluable Volunteers

East Hampshire Citizens Advice Bureau – Map of 2013/14 Clients

Clients



Deprivation Rank



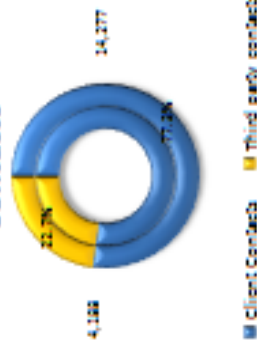
Headline Statistics

New Enquiries **6,333**
 Client Contacts **14,277**
 Advice Issues **18,008**

Enquiries by Work level



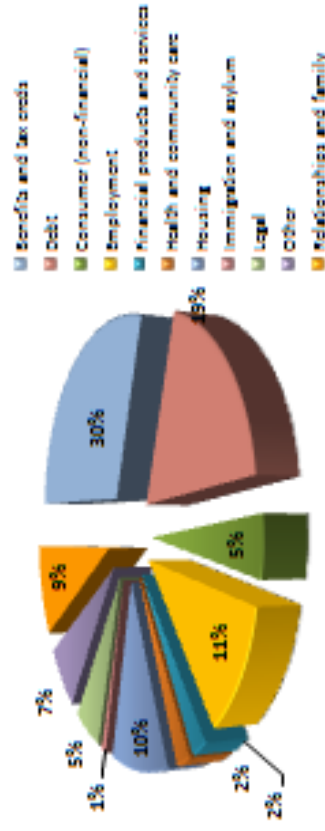
Contacts



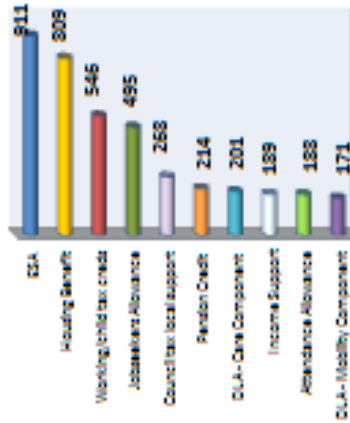
Top 3 Advice categories

Benefits and tax credits **5,337**
 Debt **3,360**
 Employment **2,003**

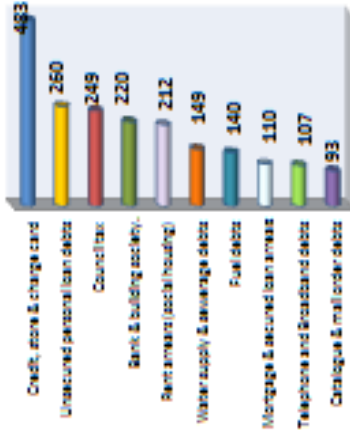
Advice issues by category



Top 10 Benefit Issues



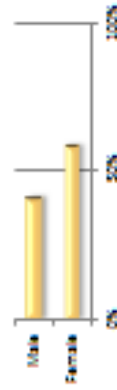
Top 10 Debt Issues



Household type



Gender



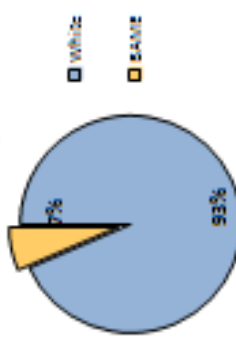
Disability



Age Range



Ethnicity



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with special thanks to the dozens of organisations who we partner
with and who fund us, including ...

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**East
Hampshire**
DISTRICT COUNCIL



**WE ARE
MACMILLAN.
CANCER SUPPORT**



**Community
First HEH**



Citizens Advice Hampshire
Let's work together



**Community
Solutions**
Information & Support Service



**Hampshire
County Council**



healthwatch
Hampshire

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