



# Havant & District Citizens Advice Bureau

## 2013/14 Annual Report & Accounts



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### Our aims ...

-  To provide the advice people need for the problems they face
-  To improve the policies & practices that affect people's lives
-  To provide free, independent, confidential & impartial advice to everyone on their rights & responsibilities
-  To value diversity, promote equality & challenge discrimination

[www.havantcab.org.uk](http://www.havantcab.org.uk)

Registered Charity Number: 1111564  
Company Limited by Guarantee Number: 05517228



## Joint Chair and CEO report

We would like to firstly thank all those who continue to make it possible for us to run an effective and highly valued local advice service. The volunteers, staff and trustees along with Havant Borough Council ... we could not continue without you, so a very big thank-you.

We have enjoyed a very successful 2013/14. Last year was our 50th year of operation and this year is the 75<sup>th</sup> anniversary of Citizens Advice nationally. We have also continued the collaborative working with East Hampshire CAB, and our two major new projects 'workoutyourmoney' and 2020 vision for advice have commenced. Our client numbers continue at the record level achieved in 2012/13.

Here are our highlights of the year:

- ✚ Collaborative working with East Hampshire CAB enabling a shared CEO role and shared working to continue to develop
- ✚ The 2020 vision for advice project commenced, using Cabinet Office/Big Lottery funding, worth £340,000 for an East Hampshire CAB led project to redesign advice services across our region and to support new ways of working/new technology
- ✚ The 'workoutyourmoney' project commenced, using Big Lottery Reaching Communities funding, worth £390,000 for a local money awareness project
- ✚ Client numbers continued at the record level achieved in 2012/13, slightly higher than our previous peak in 2009/10, which was driven by the economic downturn and personal debt issues. Welfare benefit issues are now the dominant issue due to ongoing Government welfare reforms

The year ahead will again have its challenges, not least with acute pressures on funding with Havant Borough Council, the expectations of increasing client demand due to the ongoing welfare reform and continuing uncertainty regarding our premises at Waterlooville. Our 2020 vision for advice project will be moving towards a critical stage, with huge implications for the way we deliver services. We are confident that next year, we will once more be able to report that it was a successful one.

**Mike Battersby, Irene Stratton & Jon Stuart**

## Advice Manager's Report

This year has seen substantial changes in the bureau from an operational point of view. We had our Citizens Advice Quality Audit in April 2013 and we passed with a



slightly better overall result than last time of 74% which was very encouraging.

Also in April we joined up with other bureaux in Hampshire on the Adviceline so that our clients receive a more reliable service on the telephone when they ring for information and to start the advice process. This has meant that the phone is available as a means of accessing the CAB service for our clients for more of the week as other bureaux answer when we are either closed or unable to pick up. All clients receive a gateway interview by the bureau that answers the call and clients who need appointments can be contacted by their home bureau. We have kept in close contact with other members of the Hampshire Adviceline Group, which is one of the most successful in the country in terms of calls answered.

The changes to the Social Fund led to a new working relationship with Hampshire County Council Local Welfare Assistance scheme that was set up to replace Crisis Loans and Community Care Grants. We have had some excellent help for vulnerable clients from the scheme which has proved very good at reacting to need.

In August 2013 the most radical change was the move over to Petra, our new case management system, which proved a challenge in terms of training and set up for all bureaux in Hampshire. All our volunteers and advice staff had to get to grips with the new system and the transition went very well despite many issues with the reliability of the system itself. The system has many defects and drawbacks and volunteers have done well to familiarise themselves with it during the year while CitA tried to improve the response time and reliability of the system. Issues remain with the Money Advice Module and there has been a lot of down time due to the unreliability of the system involving extra work for volunteers and staff to input data.

We opened a kiosk in Havant Plaza so that our Adviceguide website and other local and national information is easily accessible in the foyer there at all times when the Plaza is open.

We took part in the Plaza showcase day on 16<sup>th</sup> July 2013 when HRH Princess Anne came to open the building and met with Jon and Jane briefly at our stand at the event.

Our longest serving volunteer, Anne Swinburne received a special award for her service from the Mayor of Havant in September 2013 at a ceremony at the Plaza. Anne has been with us as a volunteer for more than 25 years and is a stalwart on the telephone team.



We took part in many other events in the county including Hampshire Advice Network and the local Financial Inclusion forum, and events around debt organised by Payplan and mental health information day by the police. We also gave talks to the Probation Service group in Leigh Park and the local Womens' Institute on our service. Our welfare benefits team attended the forum run by Oxford Welfare rights who provide Specialist Support for Hampshire.

Our welfare benefits caseworker Hugh Goffey has continued to help clients with benefit appeals and has had several successful outcomes thanks to his attention to detail and thorough approach. Tim Downey, another volunteer adviser has also begun taking on welfare benefits casework under the guidance of Amanda Whiteland-Smith.

In January 2014 we took on the Healthwatch Hampshire NHS Complaints Advocacy Service from the Isle of Wight CAB. Faith Patterson transferred roles from the Surestart Outreach caseworker to become the supervisor of the 2 advocates. The service is managed by Sue Alford but based in Havant, and the advocates work remotely. We had a steep learning curve to get ourselves up to speed with this new venture.

Lastly in March 2014 we started a Solicitor panel in Waterlooville CAB with solicitors Jag Kainth from Bonallack and Bishop in Salisbury and Julieann Nicoll from Blavo in Portsmouth, who give free advice to our clients on family and housing law respectively on alternate weeks. This has proved very popular with clients, especially as legal aid has been drastically cut for family issues in particular unless domestic violence is involved.

**Jane Mercer, Advice Quality Manager**



## Training Manager's Report

In previous eras, there was a policy of recruiting volunteer trainees for differing roles, as the demands of the Service dictated. During 2012/13 a new policy began of training all (non-reception) recruits to be Gateway Assessors first. This led to a healthy level of resourcing across the District for this important 'triage' stage in the client advice process.

The unforeseen consequence of this new approach however, was a lack of Advisers to whom clients could be referred post-Gateway. Consequently, in Spring 2013 a cohort of seven trainee Advisers started a fifteen week course of weekly in-house tutorials. Unfortunately several trainees departed during this time for various reasons (health, employment demands, and unsuitability for the role), so only four went on to become certificated competent Advisers during 2014.

In September 2013, a new cohort of gateway Assessor trainees commenced an eight week in-house course. Seven commenced, six completed and three remain as qualified Gateway Assessors.

Spring 2014 saw the first of two groups of trainee Reception workers undergo core training, with an increased emphasis on customer service, as the professionalism of our Service demands. Following this initial training, eight receptionists went on to train as Gateway Assessors, of whom four became active Assessors in the District, the others either preferring to remain as Receptionists or leaving due to employment or the demands of caring responsibilities.

In addition to the above, during 2013/14 two large groups of Gateway Assessors were trained to respond to clients' enquiries via the Adviceline telephone service and on-going volunteer and staff development continued to be addressed using courses run by CitA and other specialist organisations.

**Sue Craft, Training Manager**



# 2013-14 DASHBOARD

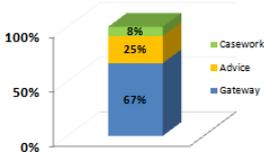
Full Year

East Hampshire Citizens Advice Bureau Ltd

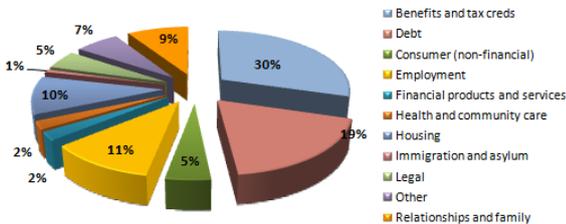
### Headline Statistics

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

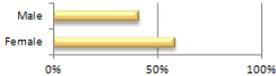
### Enquiries by Work level



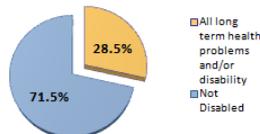
### Advice issues by category



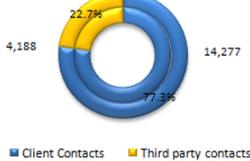
### Gender



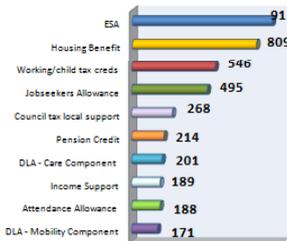
### Disability



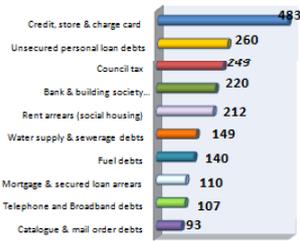
### Contacts



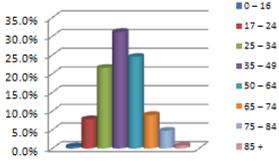
### Top 10 Benefit Issues



### Top 10 Debt Issues



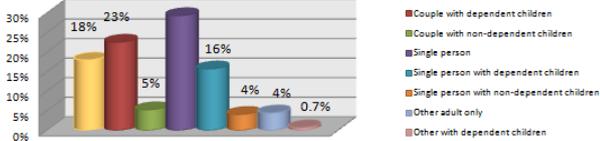
### Age Range



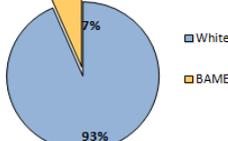
### Top 3 Advice categories

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

### Household type



### Ethnicity



Supported by



**Havant**  
BOROUGH COUNCIL

Citizens Advice



**WE ARE  
MACMILLAN.  
CANCER SUPPORT**



Hampshire  
County Council

**healthwatch**  
Hampshire



LOTTERY FUNDED



Community  
Legal Service

