

# The difference we make

Our Annual Review 2017/18



**citizens  
advice**

**New Forest**

Registered Charity 1132425

# We are Citizens Advice New Forest

In 2017/18 over 7,000 people came to us for advice and help with solving their problems.

We're here for everyone. We help with problems like managing debt or household bills, understanding rights at work or housing issues. We also provide specialist services in debt, and employment law; and for people dealing with cancer in their families, through our partnership with Macmillan.

We're an important part of the New Forest community, with offices in 5 market towns and outreach services in Fordingbridge and at Oakhaven Hospice: locations where people need us.

Through our daily interaction with clients, we have a credible understanding of local needs. We use our data and insight to tailor our services, as well as help improve policies and practices locally.

Putting our clients' needs at the heart of decision-making means we also work in partnership with others, making it easier for clients to access relevant services.

We are an independent charity reliant on local fundraising to survive.

We're also part of the National Citizens Advice service. This means we share knowledge and best practice so that people can expect a quality service. Together we work to fix the underlying causes of people's problems using evidence gathered from across our network.

Because of this, we save society money. In 2017/18, for every £1 invested in our service, we benefit our clients by £12 and we saved government and public services £435 million (National Citizens Advice Annual Report).

This report sets out some of the key achievements of Citizens Advice New Forest from September 2017 to September 2018.



*Our youngest volunteer Jaz showing our local MP our new self service advice terminal.*

# This is Mary

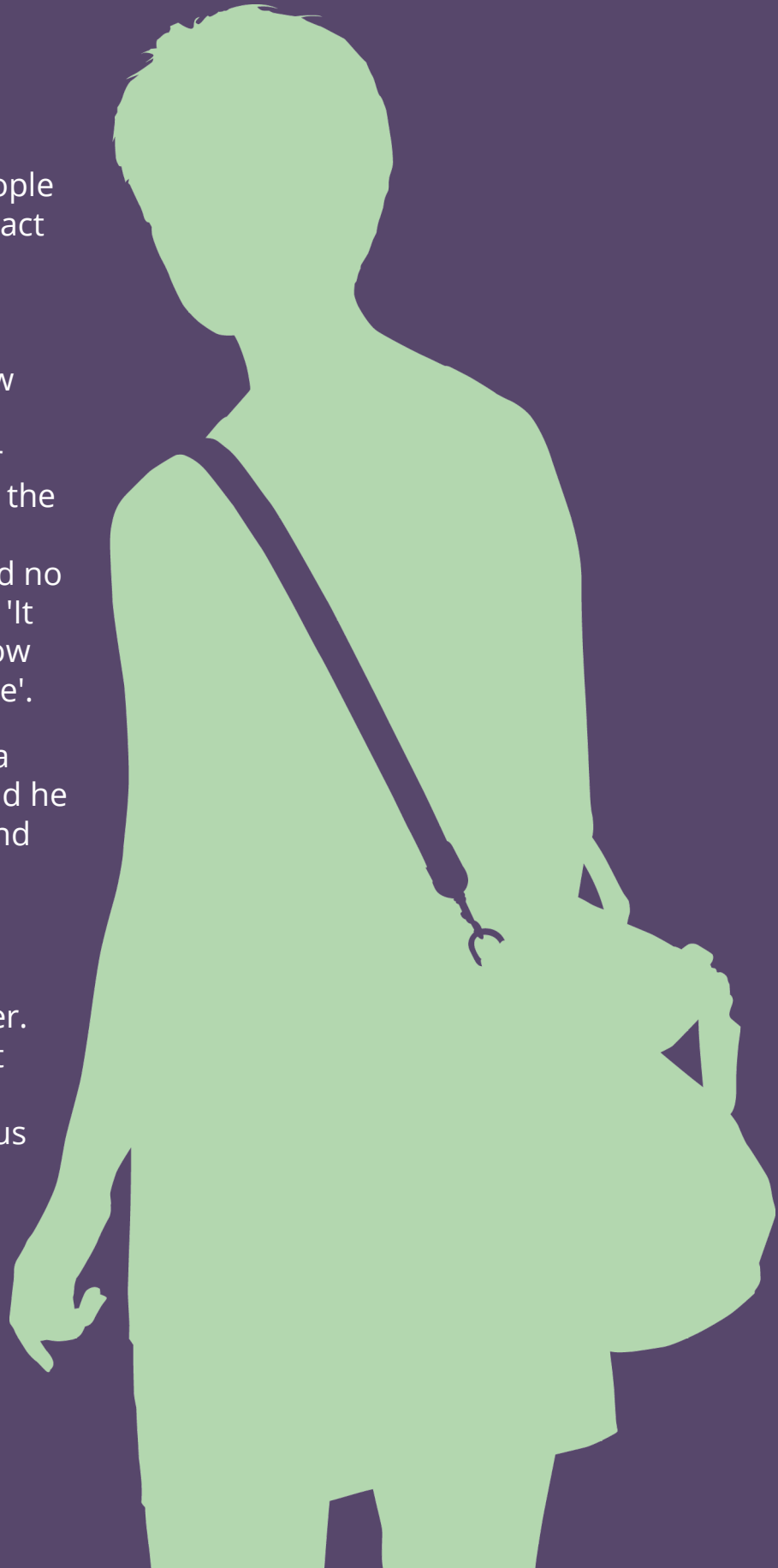
Mary is an example of one of the people we helped in 2017/18.

Her story shows how we help people solve their problems and the impact this has on their lives and wider society.

Mary came to Citizens Advice New Forest seeking help after being dismissed from her job as a carer after an incident at work. Prior to the incident she had been with the company for over 4 years and had no previous problems. She explains. 'It was a total shock, I just didn't know what to do or what my rights were'.

Citizens Advice New Forest have a specialist employment adviser and he was able to sit down with Mary and her partner and work out a way forward.

Mary's partner explains; 'We developed an Action Plan together. Citizens Advice helped us present Mary's case and make an appeal against her dismissal. They gave us the tools we needed and the confidence to use them. They supported us through the appeal process which resulted in Mary returning to work.'



# Our Aims

Citizens Advice New Forest provides free, independent , confidential advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

We aim:

- \* to provide the advice people need for the problems they face**
- \* to improve the policies and practices that affect people's lives.**

In order to achieve our aims we need to provide a flexible, responsive service that is in touch and up to date with the issues affecting our local community.

The top 5 issues we helped people in our community with in 2017/18 were:



## **1. Benefits**

We helped 1,921 clients with 4,166 issues to do with benefits claims.

## **2. Employment**

We helped 926 clients with 1,902 issues relating to their employment.



## **3. Debt**

We helped 687 clients with 1,812 issues to do with debt.

## **4. Relationships & Family**

We helped 950 clients with 1,759 issues

## **5. Housing**


We helped 917 people with 1,691 housing issues.



# How we help people

People can access our services through different channels:  
In 2017/18

61% of clients had face to face advice  
28% of clients used our Adviceline  
phone service  
7% of clients emailed us  
3% of clients used webchat.

 **7 in 10** people are  
helped to solve their  
problem.

What our statistics and evidence is showing us is that as online advice services improve less people are coming for 'everyday' advice. Instead we are seeing clients with increasingly complicated needs who are coming to us to help with a range of complex and inter-connected problems.


The case study of Francis below illustrates this point -



Francis had surgery back in 2013 that left him severely incapacitated. He was no longer able to work, he had substantial debts and was just about keeping his head above water. He contacted CANF in Dec 2017 and through Energy Best Deal successfully applied for a Warm Home Discount. He returned later that month following decisions by his benefit providers on which he wanted help to appeal. CANF again helped and he was awarded the limited capability for work related activity of Universal Credit and the daily living and mobility components of PIP.

## What this means

The wider impact of advice - what we achieve as a result of solving problems and providing support - is just as important.

 **4 in 5** people said advice improved their life, including improving their health and finances.

Other benefits include:

- **3 in 5** people we advised found it easier to manage day-to-day
- **Nearly 1 in 2** felt they had better relationships with other people
- **2 in 5** had a more secure housing situation
- **3 in 10** found it easier to do or find a job.

Outcomes and Impact Research (2017)



Whilst assisting Francis with his benefit appeals CANF were also helping him to maintain contact with his creditors and manage his debts. He decided to apply for bankruptcy which has enabled him to make a fresh start.

Jeff our operations manager explains:  
*'Clients often come in with one problem, we build up a relationship and often discover that there are more issues we can help with. In this case we helped with energy advice, benefits and debt.'*

# How our advice changes lives

We do more than fix immediate problems. Our advice makes a significant difference to the people we help.



**4 in 5** people say our advice improved their life.

## **Our advice can improve people's health**

Having a problem can adversely affect someone's mental or physical health. Our advice helps. 70% of the people we help said they felt less stressed and 46% said their physical health improved. This is also true for people with existing health conditions who require additional support from health services as a result of their problem. 57% said they were better able to manage their condition after coming to us.

## **Our advice makes a difference to people's finances**

We support thousands of people each year to better manage their money. We provide advice on debt, benefits and consumer issues, as well as help people improve their money skills. Given that the people we help are more likely to struggle financially than on average, this can make a vital difference when money is tight. Nearly 1 in 2 people say that they had more money or control over their finances after advice.

## **Our advice can make people more resilient**

3 in 5 people said they had low confidence about taking action to solve their problems before advice. After advice, 2 in 3 felt more confident to handle a similar problem in future and 3 in 4 felt more knowledgeable regarding their rights. We respond to people's needs and increase their ability to solve their own problems in future.

Outcomes and Impact Research (2017)



What our Clients say.....

*'Thank you so much for all your help and advice, support and belief. It's all over now. It was a worry and now it's a relief and its all down to you the wonderful Citizens Advice office '*

Thank you card - Totton office

# Why we're needed

Problems have a severe impact on people's lives. They need our help to solve them.



**77%** of the people we help say they would not have been able to solve their problem without our support.

## Problems can make everyday life harder

4 in 5 people we help had experienced a big life change before coming to us - with nearly half reporting a change in their health situation. 9 in 10 people say their problem affected their lives, including causing financial difficulty and making managing day-to-day harder.

## Knowing how to take action isn't always obvious

More than 2 in 3 people say they had difficulty knowing who to contact or how systems work. This is particularly important, as 1 in 3 people turn to us when they have to take action urgently.

## Solving your problem can also be about having the right skills

Nearly 1 in 2 people we help aren't confident about taking action on their money matters.<sup>1</sup> Nearly 1 in 3 report needing help to use online services, forms and tools.

If left unsolved, these problems don't just affect the individual - they impact on this community. Solving these problems also creates considerable value to society.<sup>2</sup>

Outcomes and Impact Research (2017)

1. Understanding money skills.
2. Modelling the value of the Citizens Advice service.



**The 2018-2023 Citizens Advice New Forest Business Plan sets out an objective to**

***'Secure community supported facilities at locations where the service is most needed.'***

**The first tangible result has been our relocation to Ringwood Library in October 2018.**

# Our value to society

**In 2017/18 for every £1 invested in our service we generated at least:** <sup>3</sup>



**£4.86** in savings to government and public services (fiscal benefits)

By helping stop problems occurring or escalating, we reduce the need for public services (health, housing, out-of-work benefits).

**Total £1.648 million**

**£29.00** in wider economic and social benefits (public value)

Solving problems improves lives – and this means better wellbeing, participation and productivity for the people we help.

**Total £9.83million**

**£21.55** in value to the people we help (financial outcomes of advice)

As part of advice, we can increase people's income, through debts written-off, taking up benefits and solving consumer problems.

**Total £7.303 million**

It's impossible to put a financial value on everything we do – but where we can, we have.

We've used a Treasury-approved model <sup>4</sup> to demonstrate our financial impact.

3. Modelling the value of the Citizens Advice service.

4. Available from New Economy.



## **Hampshire Macmillan, New Forest Oct 17 - Sept18**

Some truly impressive results from our caseworker Marilyn who has supported **319** families in the New Forest this year.

She has helped them apply for **£1.156** million of benefits and grants to help them when they need it the most.

# Our value to this community



Our savings to the public purse includes local government.



This is only one fraction of our true value - we also:

- Help clients negotiate local processes, such as welfare reform changes.
- Help local authority rent and council tax arrears to be rescheduled and reducing the associated administrative costs .

We ensure local people can get on with their lives by helping them maximise available income – preventing more critical and costly intervention by the state.

This helps reduce financial difficulty, promotes inclusion and benefits the economy.



## OUR KEY ACHIEVEMENTS IN 2017/18

1. In Oct 2017 CANF's advice quality standard was renewed at advice level, with the telephone standard and casework accreditation in welfare benefits and employment.

2. In July 2018 National Citizens Advice agreed a green rating overall, and against equality and leadership.

3. We formed a new partnership with Hampshire County Council Library Service and relocated our Ringwood office into Ringwood library.

4. We have been supported by our local MP and ran a successful local fundraising campaign to fund our relocation at Ringwood.

5. We have developed our social media presence and started publishing a bi-monthly newsletter.

6. We continue to serve our clients, helping 7,976 clients with 15,831 issues.

7. We set up a New Forest Advice line service, answering New Forest telephone enquiries from our New Forest offices.





## FINANCE

### Financial Performance

Detailed information of the Bureau's financial performance in 2017/18 is available in our Statutory Annual Accounts and Trustees Report. The summary is as follows:

Incoming resources were £336,986 (2017: £337,347), of this £25,379 (2017: £25,802) related to project restricted activities.

A deficit of £7,785 (2017: £6,318 deficit) occurred in the year. At 31 March 2018 total reserves were £128,662 (2016: £136,347). The deficit is attributable to the 'one off' cost of exiting two leased premises.

### Core Funding

CANF continues to work and plan in a challenging context.

CANF enjoys an excellent relationship with New Forest District Council, its core funder, and received grant aid settlement of £ 255,000 for 2017/18.

In 2017 /18 CANF has been working closely with NFDC to secure a future partnership agreement with clear objectives and funding.

### Project Income

In 2017/18 CANF delivered a number of successful projects :

Energy Best Deal

Macmillan Cancer support service

Healthwatch

Hate Crime

These projects bring in additional income, involve working with partners and deliver additional services to our clients.

Core funding from local authorities and project income makes up a substantial proportion of our funding. However, this does not cover all of our costs. In 2017/18 we placed a renewed focus on fundraising.

We ran a successful fundraising campaign to attract funds to relocate our Ringwood Office base into Ringwood library. Our thanks go to the many local organisations and supporters in Ringwood and surrounds who donated over £15,000 to our Ringwood project.



*Representatives from Ringwood Rotary, The Russell Trust, Ringwood & District Older People's Welfare Association and New Forest District Council at Ringwood launch Nov 2018.*



# The wider value of volunteering

One of the areas where we're only able to partially demonstrate our savings to public services is volunteering.

Volunteering also benefits our volunteers - they improve their skills, resilience, health and wellbeing, while strengthening community engagement.

Our training and the experience of supporting others helps volunteers improve their own employability.<sup>5</sup>

- **8 in 10** of our unemployed volunteers believe they are overcoming barriers to employment.
- **54%** of our employed volunteers state that they are using it to change or evaluate their career.

This is an additional benefit to society through the way we deliver our services.

5. CAB volunteering: how everyone benefits.

## Our Fantastic Volunteers

We have 130 volunteers at Citizens Advice New Forest. The roles they cover vary from: advisers, receptionists, administrators, trustees, campaigners or social media specialists. Each and everyone plays an invaluable part in making our service unique.

## My work as a volunteer at Citizens Advice New Forest

My name is Sandy and I started my training as a generalist adviser 18 years ago when my eldest child started school. I was in receipt of Income Support as a single parent but was not prepared to sit and watch daytime TV all day so I looked for a volunteer role in the community.

Of course the main aim of the work and what attracted me to it then and keeps me interested all these years later remains the same – to help people and support those fighting for social injustice. Every session has a different mix of clients, you never know what is going to walk through the door.

Knowing you have helped someone, improved their situation and on occasion made a financial gain on their behalf is most rewarding. It is also very satisfying to gain new skills and work with a lovely group of people that are of the same mindset with an interest in supporting local people.



In 2017 /18, 130 volunteers contributed over **27,000** hours of work to CANF.

The estimated value of our volunteers' contribution to our work is **£588,888**.

Source: Citizens Advice Financial Modeling 2018.

## **ACKNOWLEDGMENTS & THANK YOU**

The Bureau thanks all funders, volunteers, staff and other supporters without whose support we could not continue. Our thanks go to:

### **Our Funders and Supporters**

New Forest District Council, our core funder, and also the provider of support in many other ways.

TH Russell Trust, Rotary Clubs of Ringwood and Lymington, Ellingham Agricultural Society, Barker Mills, Dibden Allotments, Ringwood and District Older People's Association, Citizens Advice Hampshire, CAF Tourle Foundation Fund, local masonic lodges, Tesco's Bags for Help, Waitrose.

Simpkins and Co, Moore Blatch.

The many Town and Parish Councils which continue to support us: Alderholt Parish Council, Boldre Parish Council, Bramshaw Parish Council, Bransgore Parish Council, Brockenhurst Parish Council, Burley Parish Council, Damerham Parish Council, East Boldre Parish Council, Exbury & Lepe Parish Council, Fordingbridge Town Council, Hordle Parish Council, Hyde Parish Council, Hythe & Dibden Parish Council, Lymington & Pennington Town Council, Marchwood Parish Council, Martin Parish Council, Milford on Sea Parish Council, Minstead Parish Council, New Milton Town Council, Netley Marsh Parish Council, Ringwood Town Council, Sopley Parish Council, St Leonards & St Ives Parish Council, Sway Parish Council, Totton Town Council, Verwood Town Council, West Moors Parish Council and Whitsbury Parish Council.

### **Our Volunteers (September 2018)**

Alan Wilson, Alexia Rees, Andrew Barham, Ann Cox, Ann Norris, Anne Hunt, Annie Armston, Brenda Cory, Brenda Matthews, Caroline Duffett, Carolyn Bryant, Celia Cheadle, Christine Makings, Clive Bailey, David Chapman, Deborah Griffiths, Dennis Bates, Elizabeth Clemis, Elizabeth Ralley, Erica Mallon, Francis Turner, Gemma Crowley, Gill Garney, Gill Wheeler, Gillian Clapperton, Gillian Davis, Gillian Devonshire, Graham Forgan, Heather Barber, Heather Graham, Hilary Keene, Ian Evans, Ian Large, Jan Briddick, Jan Siejko, Jane Muggeridge, Jane Self, Janet Dawson, Jasmine Rodger, Jennie Worsdale, Jenny Callaghan, Jenny Hood, Jeremy Allin, Jess Enos, Jessica Collins, Jill Bansback, Jim Madge, Jo Collins, John Barns, John Lay-Flurrie, John Penfield, John Purves, Julia Wood, Julie Vidler, Kate Miles, Katherine Jackson, Katherine Quinn, Kathleen Hales, Kathryn Fletcher, Kay Sutton, Keith Grand-Scrutton, Keith Sinclair, Ken Hardy, Kim Maidment, Kirsten Marsh, Laura Ivey, Leanne Keily, Liz Tuckey, Lynda Chapman, Magdalen Chadbourn, Margaret Fields, Margot Grimwood, Marion Gregory, Mavis Harding- Gillings, Mervyn Hughes, Michael Jenkinson, Mick Bennett, Mick Lockwood, Nicholas Walford, Nicky Cook, Nicky Edwards, Noreen Griffiths, Pat Asher, Pat Cardey, Pat Freeman, Pat Robinson, Patricia Brown, Patricia Berry, Paul Boyton, Paul Chitty, Paul Longley, Paul Spargo, Pauline Smith, Peter Vening, Phil Hield, Rachel Penny, Raffy Tejrjian, Rayner Brammall, Richard Allan, Richard Busk, Rob White, Roger Bird, Rose Adams, Rowena Fowler, Roy Bunce, Rupert Andrews, Sahana Goodwin, Sandy Negrescu, Sarah Lockwood, Sheila Wick, Steve Middleton, Steven Craven, Su Leonard, Sue Smith, Susan Ashby, Suzanne Brown, Teresa Curry, Tina Facey, Tom Whitlock, Trevor Pogson, Trudi Fanti, Vicky Howell, Virginia Curtis.

### **Our Trustees (September 2018)**

David Scillitoe (Chair)  
Glynne Miles (Vice Chair)  
Eric Read (Treasurer)  
John Hatchard  
Steve Simpkins  
Jeremy Taylor  
David Johnson  
Jacque Aiken  
Janine Morris  
Harry Nash

### **Company Secretary**

David Scillitoe

### **Our Staff (September 2018)**

Chief Officer:	Alison Talbot
Operations Manager:	Jeff Wiltshire
Advice Services Managers:	Justine McMahon Sharon Parr Jim Sanders Emma Absolom Helen White Astrid Davies
Macmillan Adviser:	Marilyn Seabrooke
Finance Officer:	Penny Turner

### **Our Company and Contact details**

Citizens Advice New Forest is an operating name of New Forest Citizens Advice Bureau, a registered charity No: 1132425.

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Twitter: [twitter.com/cabnewforest](https://twitter.com/cabnewforest).

# Citizens Advice helps people find a way forward.

We provide free, confidential and independent advice to help people overcome their problems.

We are a voice for our clients and consumers on the issues that matter to them.

We value diversity, champion equality, and challenge discrimination and harassment.

For regular updates on what we're learning about how our services work and how we use this insight visit **[citizensadvice.org.uk/impact](https://citizensadvice.org.uk/impact)**.

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