

The background is a solid yellow color. There are three large blue circular shapes: one in the top left corner, one on the left side (partially cut off), and one in the bottom right corner. The text is centered on the page.

**New  
Forest**

The logo consists of a blue circle. Inside the circle, the words "citizens advice bureau" are written in yellow, stacked vertically. A thin yellow vertical line is positioned to the left of the text.

**citizens  
advice  
bureau**

# Annual Report 2013-2014

*"Working Together"*

New Forest Citizens Advice Bureau: Charity Number: 1132425

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Advice Quality Standard: certified until August 2017

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Solicitors, Christchurch, Dorset.



# 1 Aims and Principles

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

The service aims:

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives



By informing clients of their rights, we aim to empower them so that they can help themselves. Through our campaigning activity we use the evidence provided by our clients to positively influence practices and law. We do this at a local and, by pooling our information, at a county and national level

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## 2 The Service

The New Forest CAB provides a service from 5 offices in the district at: Hythe, Lymington, New Milton, Ringwood and Totton together with an outreach facility in Fordingbridge. We provide our service through face to face contact with clients, by email and correspondence and through the new and successful Adviceline telephone service operated from the Lymington office (but providing advice across the New Forest area).

We are an independent registered charity. Without funding from our supporters and the contribution of our volunteers New Forest CAB could not continue to provide its services.

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## 3 Key achievements summary

In 2013/14 the Bureau helped 8,756 clients (2013: 7,649) and dealt with 17,007 problems (2013:17,221)

### **Notable achievements in the year were:**

- Establishment and development of the New Forest Advice Network
- Successful implementation of PETRA, the Citizens Advice client information system
- Introduction of Healthwatch information and advice service
- Successful Quality of Advice Audit with Social Policy performance noted as a strong area of performance

In addition we continued our financial strategy of cost efficiencies by preparing for the relocation of our Lymington office to alternative premises which are still central to the town but have a lower annual cost.



## 4 Chair's Report

This has been another busy year for the Bureau. We have consolidated our operations using the Petra case management system introduced last year, undergone our three yearly external audit on our Quality of Advice and Operational Management, moved the Lymington office and developed the emerging New Forest Advice Network in cooperation with our partner charities.

The external audits concluded with passes in both cases and we were praised in particular for our contribution to Citizens Advice social policy activities. The move of the Lymington office has provided a modern facility located close to the old high street office providing much improved access to our clients at ground floor level and with the welcome added benefit of lower annual running costs. The Big Lottery's Advice Services Transition Fund project has progressed into its second year and the New Forest Advice Network (NFAN), led by the Bureau, is now active in its development work to improve access to advice for all in the New Forest

This year we have said goodbye to Florence Gallien, our previous CEO who left in the summer to take up a career in the National Health Service and welcomed Andy Clapper into the role. Andy of course is well known to many as he has been our project manager for the NFAN project, a

role which he now relinquishes. We also welcome Alison Talbot as NFAN Project Coordinator. I am also delighted that Jeff Wiltshire has been confirmed in his role of Principal Services Manager reporting directly to Andy. We wish them well in their new appointments.

I would like to extend my thanks to the New Forest District Council for their continued unwavering support for the NFCAB, and to all the councils and other organisations who have donated funds to our cause over the year.

Finally I would like to thank all our staff, volunteers and my fellow Trustees for their continued hard work, dedication and commitment to the NFCAB without which we would not be able to provide the high level of service to the local community.

*Jeremy Taylor, Chair*

## 5 Chief Executive's Report

As I have only been in post for 4 months as I present this Annual Report, the first thing I wish to do is to acknowledge the work of my predecessors, Peter Wales and Florence Gallien, in laying such a firm foundation from which the Bureau can go on to develop further its proud record of service to the community. I would also like to acknowledge the friendliness with which I have been greeted by all within the service and the support I have been offered in

finding my way, particularly from the Chair, Jeremy Taylor, and the Principal Services Manager, Jeff Wiltshire.

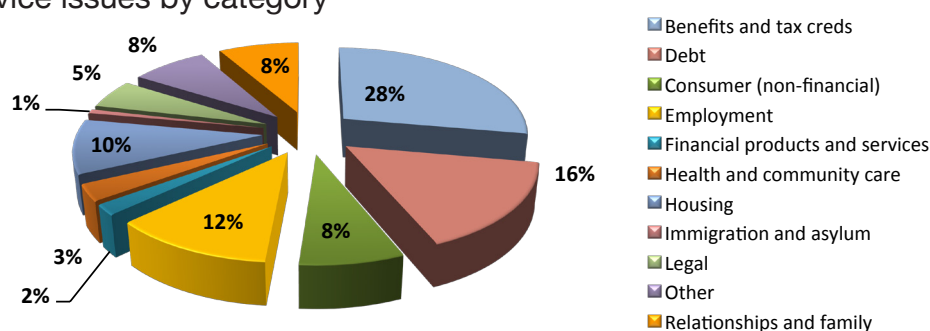
The achievements over the past 12 months have been considerable on a number of fronts but most importantly in terms of the help that we have given to individual clients and, through our campaigning work, the people of the New Forest as a whole.

### Our Support for Clients

As noted in our Key Achievements, we helped 8,756 clients with 17,007 problems. As is apparent from these figures, many people who come to us have multiple problems and our advisers are skilled in identifying these even though they may not be the initial issue presented. Indeed, often the initial issue presented is the symptom rather than the cause of the difficulties being experienced.

*The chart below shows the range of advice issues our advisers dealt with in 2013-14.*

Advice issues by category



From this it can be seen that the most common problems people were seeking help with were:

Benefits and tax credits	4749
Debt	2726
Employment	2017
Housing	1688
Relationships and Family	1412

It is easy to see how many of these problems are interrelated and the stresses which result on individuals and families as a result. Our advisers provide a vital service in helping people to address their problems and as a result contributing to health and wellbeing in the community.

## Outcomes

Indeed whilst the volume of work handled in the Bureau is impressive, it is, of course, the outcomes for clients which are most important. Historically, the service has not been strong on recording Outcomes but there are figures in our most recent Bureau Outcomes Report provided by Citizens Advice which show the extent of financial help given to clients:

£556,600 worth of income gain was recorded, including at least £503,200 of benefit gain

The average benefit or tax credit gain per client was £4,700

£218,100 worth of debt was written off – the average was £8,400 per client

*Source: 2012/13 NFCAB Outcome Report (covers enquiries opened in 2012/13)*

## Targeted client work

In addition to our general advice we provide more targeted advice in a number of areas as a result of specific contracts, as follows:

- |                         |  |
|-------------------------|--|
| <b>Macmillan</b>        | We deliver an advice service for people affected by cancer through a contract with Citizens Advice Hampshire in partnership with Macmillan Cancer Support. In addition to offering services in the Bureau with initial contact by telephone, we also operate outreach services at the Oakhaven Hospice, Lymington. |
| <b>Energy Best Deal</b> | The Energy Best Deal project is aimed at raising awareness and empowering customers to make better decisions on energy savings in the face of rising energy costs.   |
| <b>Healthwatch</b>      | As part of Healthwatch Hampshire we provide an information and signposting service to people who have queries or concerns about health services.   |

## Financial Performance

Detailed information on the Bureau's financial performance in 2013/14 is available in our Annual Accounts. The summary is as follows:

Incoming resources in the year were £415,298 (2013: £373,146); of this £125,069 (2013: £103,679) related to project restricted activities. A surplus of £31,082 (2013:

deficit £41,386) occurred in the year. At 31 March 2014 total reserves were £114,271 (2013: £83,189). The surplus of £31,082 arose because expenditure on the Advice Services Transition Fund (NFAN) project was £47,032 less than planned. As a result there was a working deficit of £15,950 at the year end.

## How we work

We provide advice in many ways as can be seen by the following chart:

Client contacts by channel



We know that different people like to use our services in different ways and so we will continue to have various routes of access. All advice given, though, is based on trusted sources made available through the Citizens Advice network and constantly updated to take account of new legislation and service changes.

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

Many people, nearly 16 million nationally in 2013/14, make direct use of the Citizens Advice Advice and information website, Adviceguide, which gives information for all common advice categories and has links to many other trusted sites for more detailed information. In assessing clients our Advisers will often go through this site with them to show how they might be able to help themselves.

## Campaigning for Change

Our campaigning work was identified in our external audit as an area of strength. Some of the activity contributing to this included:

- An increase in the completion and submission of our Evidence Forms to contribute to national intelligence on social policy: 233 in 2013-14 (163 in 2012-13)
- Collaborative working with our Local Authority to improve client experiences with Housing Allowance/Welfare Changes
- Homeless monitoring and discussions with local Task & Finish Group and New Forest Nightstop to support the development of strategies to assist those homeless over 25 years of age
- The Bureau monitors the issue of food parcels and participated in the national Citizens Advice Survey during March 2014
- Participation in many national and local campaigns on consumer and welfare issues
- Liaison with our two local MPs: Dr Julian Lewis and Desmond Swayne Esq on the Bureau's work and individual cases



## Our Staff and Volunteers

As will be evident by the volume and quality of the work described in this Report, our staff and volunteers are critical to our success and provide tremendous value to our funders and the community. Quite how critical becomes apparent when we put a monetary value to their contribution.

In 2013/14: 126 volunteers contributed approximately 40,068 hours of work to the Bureau. Based on a Research Report published by the Citizens Advice Impact Team in March 2014 we estimate the value of this work at £625,060.

However, it is not just the number and value of hours that makes the difference: it is also the level of training our volunteers attain. It takes up to 2 years to become a fully trained adviser in Citizens Advice and even then the quality of work is closely monitored against exacting standards and subject to external audit. Our paid staff play a very important role in developing and supporting our volunteers through recruitment, training and supervision.

## Partnership

Our advisers could not help people effectively if we did not maintain comprehensive and positive relationships with a broad range of partners in the statutory and voluntary sectors.

In September 2013, following a successful bid to the Big Lottery's Advice Service Transition Fund, the New Forest Advice Network was established under the leadership of the New Forest CAB. Our partners in the Network are Age Concern New Forest, Community First New Forest,

It's Your Choice and New Forest Disability Information Service: a network of trusted partners with great experience in their specialist fields and all committed to improving access to advice for the people of the New Forest.

As the Network moves into its second year of operation it is just about to go live with its cross-referral tool and web site. It is expanding its shared training programme and launching a number of initiatives to improve access to advice including:

- a project to provide accessible financial capability awareness training to young people
- a project to take outreach services out into our more remote rural communities.
- working with New Forest District Council and other agencies to explore issues around supporting New Forest residents as they make the move to Universal Credit.
- free interpretation and translation including help with client enquiries and providing assistance to make information accessible for all.

Work has now commenced, also, on the "legacy" of the project once the Big Lottery Grant expires. The aim is for sustainability of the Partnership and its work and growth to include other advice-giving agencies so we can extend the reach of advice services and improve the experience of all our clients.





## 6 The Future

More of the same would be good... but not good enough. The following is a quote from the Citizens Advice One Service Strategy consultation launched in August 2014. It sets out our context:

***“In March 2015, there will be five years of public spending cuts behind us and another four years ahead. We will be just 55 per cent of the way through the total reductions of £178bn in public spending, and many of the toughest choices will be starting to hit home”.***

We recognise the implications of this context:

- our funders have their own financial constraints: we have to demonstrate to them our effectiveness and the value for money we provide
- our clients continue to be impacted by austerity and welfare reforms: we have to help them, individually, with the support they need to manage their problems; and collectively, through our campaigning work, by challenging unfair or unintended consequences of policy and practice.

With this in mind we will review our strategic plan in 2014/15 taking the views of our funders and other interested local stakeholders including people who use our services, our own volunteers and staff.

### **Our key deliverables in the next 12 months will be:**

- maintaining the volume and quality of the services we provide for the people of the New Forest
- raising the public's awareness of the service by improved publicity including a greater presence in the press and the use of social media
- expanding our campaigning role on behalf of the people of the New Forest, using our own social policy evidence and materials from Citizens Advice nationally
- improving the financial health of the Bureau by continuing to review our cost base and seeking new sources of funds, including contracts for service and fund-raising
- exploiting the potential of the New Forest Advice Network in all of the above and, by working together, improving access to advice services.

## 7 Acknowledgements

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

### Our Funders (Year to 31 March 2014)

- New Forest District Council our core funder, and also the provider of support in many other ways including the rooms in which we hold our Trustee Board and other meetings.
- The many Town and Parish Councils which continue to support us despite the difficult financial times: Alderholt Parish Council, Beaulieu Parish Council, Boldre Parish Council, Bramshaw Parish Council, Bransgore Parish Council, Breamore Parish Council, Brockenhurst Parish Council, Burley Parish Council, East Boldre Parish Council, Ellingham, Harbridge & Ibsley Parish Council, Fawley Parish Council, Fordingbridge Town Council, Godshill 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, 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.
- Co-operative Community Fund, Ringwood Old Peoples Welfare Association, Ellingham and Ringwood Agricultural Society and Fordingbridge Rotary Club.

### Our Volunteers (November 2014)

Adele Sutton, Alan Sendall, Alan Wilson, Alexia Rees, Ann Cox, Ann Norris, Beryl Gatesman, Brenda Cory, Brenda Matthews, Brian Dixon, Brian Hood, Carole Standeven, Caroline Duffett, Celia Cheadle, Charles Holden, Christine Makings, Christine Miles, David Dublon, David Chapman, David Forder, Davis Clark, Deborah Griffiths, Ellen McGeorge, Frances Evans, Francis Turner, Gail Redwood, Gemma Crowley, Gill Wheeler, Gillian Davis, Gillian Devonshire, Gwynne Davies, Harriet Rogers, Heather Barber, Heather Graham, Hilary Hawkins, Ian Greaves, Ian Large, Jack Cartwright, Jan Painter, Janet Dawson, Janet White, Jenny Callaghan, Jenny Hood, Jill Bansback, Jim Madge, Joanna Pranczk, John Barns, John Lay-Flurrie, John Penfield, John Purves, Jo Trosh, Joyce Charron, Julia Wood, June Fletcher, Kate Miles, Kate Oakshatt, Katherine Jackson, Kathleen Hales, Kay Sutton, Keith Grand-Scrutton, Ken Hardy, Kim Maidment, Kirsten Marsh, Lesley Cottrell, Liz Tuckey, Liza Wood, Lynda Chapman, Magdalen Chadbourn, Maggie Webb, Margaret Bennett, Margaret Fields, Marguerite Frost, Marion Gregory, Marion Hebblethwaite, Mavis Harding- Gillings, Mervyn Hughes, Michael Fay, Michael Jenkinson, Mick Lockwood, Nicky Edwards, Noreen Griffiths, Pat Asher, Pat Cardey, Pat Robinson, Patricia Berry, Patricia Dempsey, Paul Bevan, Paul Boyton, Paul Chitty, Paul Longley, Pauline Smith, Peter Vening, Phil Hield, Rachel Penny, Richard Manley, Robert Morgan, Roger Underhay,

Rose Adams, Rosemary Khan, Rowena Fowler, Sandy Negrescu, Sheila Wick, Steve Brown, Steve Middleton, Susan Ashby, Suzanne Brown, Suzi Todd, Teresa Curry, Tina Facey, Tom Whitlock, Trevor Pogson, Veronica Thompson, Vicky Howell, Yvonne Fordham.

## Obituary

Sadly Teresa Rowley one of our long serving Ringwood advisers passed away recently. Teresa will be missed greatly and our thoughts are with family, friends and colleagues.

## Trustees

Jeremy Taylor (Chair)  
Philip Dinn  
John Hatchard  
Michael Lingam-Willgoss  
Alan Penson (Hon. Treasurer)  
Steve Simpkins  
David Scillitoe (Company Secretary)  
Les Sutton (Vice-Chair)

## Patron

Ailsa Montagu

## Staff (November 2014)

Chief Executive Officer:	Andy Clapper
Principal Services Manager:	Jeff Wiltshire
Advice Service Managers:	Angela Smalley
	Anne Calais
	Justine McMahon
	Sharon Parr
	Emma Weston
	Val Sargeson
Macmillan Adviser:	Marilyn Seabrooke
Administration:	Anne Pike
	Sue Neal

# 8 Our Contact and Company details

New Forest Citizens Advice Bureau  
Registered Office: Newcourt House, New Street, Lymington Hampshire, SO41 9BQ  
Company Limited by Guarantee  
Registered No: 06983394  
Registered Charity No: 1132425  
[www.newforestcab.org.uk](http://www.newforestcab.org.uk)

Chief Executive Officer: Andy Clapper  
tel: 07740 901305 email: [ceo@newforest.cabnet.org.uk](mailto:ceo@newforest.cabnet.org.uk)  
[www.newforestcab.org.uk](http://www.newforestcab.org.uk)

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Gratitude to our Funders and Partners:

