

East Dorset  
Citizens Advice Bureaux



# Annual Report 2013/14

**We're here to help.  
Whoever you are.  
Whatever the problem.**





## Board of Directors

### ELECTED MEMBERS

**Maureen Godfrey**

Chairman

**Alan Breakwell**

Vice Chairman

**John Rynne**

Company Secretary

**Graham Hall**

Treasurer

**Diann March**

Chairman of Friends

**Barbara Manuel**

East Dorset District Council

**David Morgan**

East Dorset District Council

**Sandra Grove**

Verwood Town Council

**Robin Cook**

Wimborne Town Council

### CO-OPTED

**John Muggleton**

Ferndown Town Council

### STAFF ADVISERS TO THE BOARD

**Tony Molloy**

District Manager

**Pat Temple**

Advice Manager

### VOLUNTEER ADVISERS TO THE BOARD

**Sophie Brown**

Staff Representative (W)

**Beryl Sinclair**

Staff Representative (F)

### INDEPENDENT EXAMINER

**Princecroft Willis**



**Wimborne Citizens  
Advice Bureau**  
Hanham Road, BH21 1AS

**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.

Authorised and regulated by the Financial Conduct Authority  
FRN 61759



**Ferndown Citizens  
Advice Bureau**  
1A Princes Court,  
Princes Road,  
BH22 9JG

# Chairman of the Trustee Board

Maureen Godfrey



*Firstly and most importantly I would like to say a huge 'Thank you' to the staff, volunteers and Trustees of East Dorset Citizens Advice Bureau for the high quality and volume of advice given to the residents of the area.*

I joined the Trustee Board in 1999 and am just coming to the end of my first year as Chairman. This has been an eventful and challenging year seeing the recent departure of Manager Tony Molloy to pursue other interests.

Many people are under the impression that the Citizens Advice Bureau (CAB) is funded by central Government. This is an erroneous conception as we are totally reliant on financial support from the Local Authority, Town and Parish Councils as well as other organisations for which we are grateful. We have been fortunate in attracting some legacies and donations which have been most gratefully received.

The Friends of EDCAB continue to work tirelessly to raise much needed funds for the continuation of this vital front line service.

***Thank you.***

# Office Manager

Juli Brown



*Another busy year for the admin/ reception team at East Dorset Citizens Advice Bureau. New volunteers have joined the Bureaux and have made a significant difference to the team.*

New technology has been welcomed by the team. All admin / reception volunteers now have access to an email address which has made internal communication so much more effective and efficient especially when many of them only visit the Bureaux for one session a week.

Reminding callers of future appointments has also moved onto a more technological platform and together with digital printers, scanners and faxes all members of the team have mastered these new challenges brilliantly.

The team now totals 16 and includes 2 IT volunteers and I would like to thank them as well as my admin assistant for all their hard work and dedication to EDCAB throughout the year.

Personally, I have continued to receive help and support from various individuals at East Dorset District Council and I would like to thank them for that; it has been appreciated.

# Annual Report 2013/14

Pat Temple



*The impact of Welfare reform has continued to affect many of our clients. The combined effect of the removal of Council Tax Benefit for working age people, the introduction of the benefit cap and removal of the spare room subsidy has meant that we are seeing many more people with money problems and we are very grateful for the support provided by local foodbanks to whom we have made numerous referrals.*

Other changes that have affected our clients this year have been the great reduction in the scope of legal aid and the introduction of fees payable for Employment Tribunals.

Changes such as these mean that the advice team at East Dorset CAB have to be continually updating their knowledge.

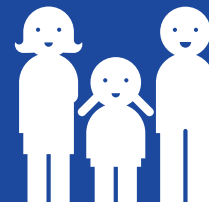
This year we not only had changes in legislation to contend with but Citizens Advice introduced a new client recording system that we are required to use. This took a great deal of training and patience before it became embedded and we only now feel comfortable with it after nine months of use. Once again we are indebted to the help of a few volunteers who have produced training materials and flow charts and have come in on extra days to support those who were struggling at the outset. Alan Hart our volunteer IT support expert set up an array of 12 linked computers in the annexe in our Wimborne bureau so that an external trainer could provide initial training for us and two other

bureaux on the system. I'd like to thank everyone for their patience and resilience during the learning period.

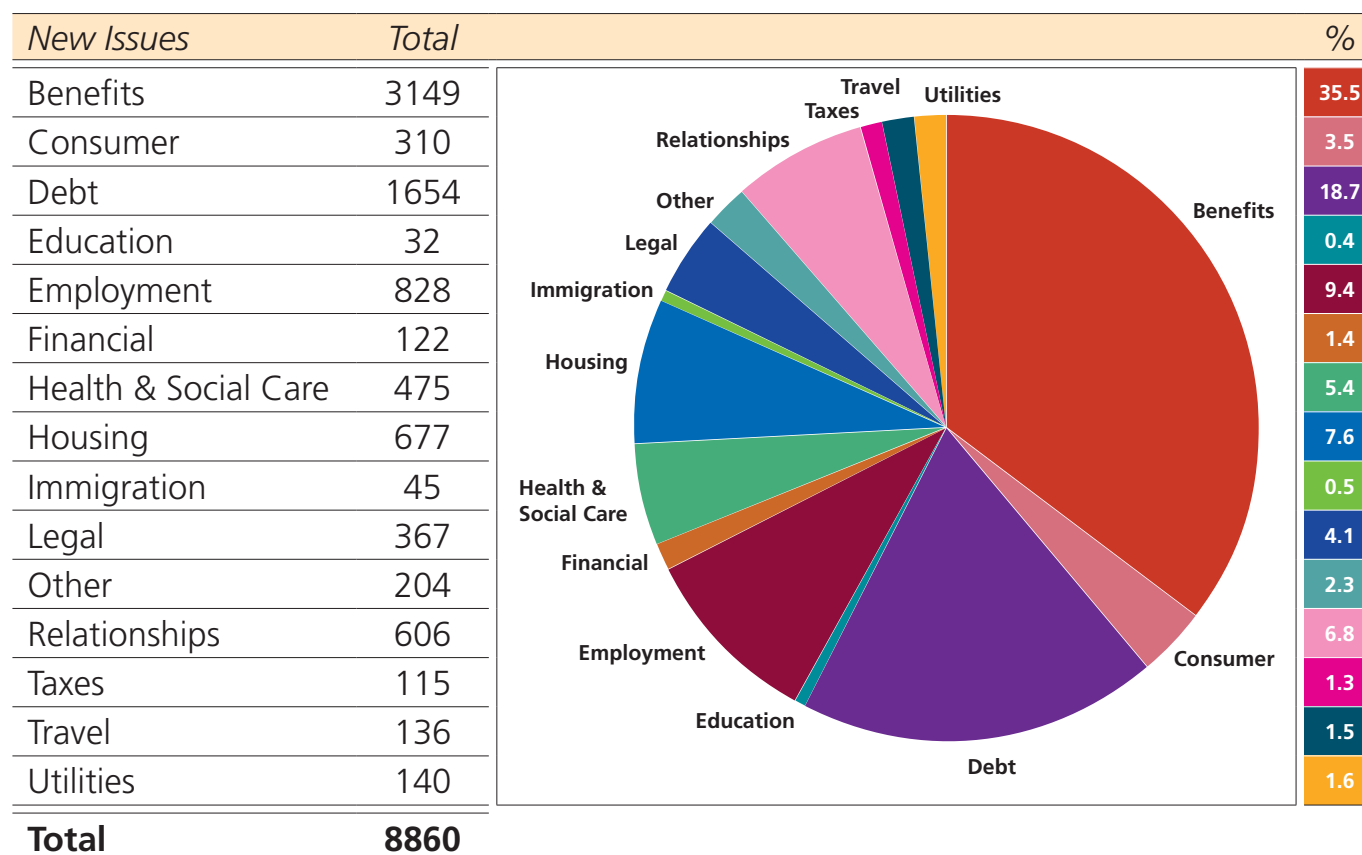
I can't let my report of this year pass without congratulating the advice team on another splendid result in the quality of advice audit that took place in July 2013 in which we scored a very creditable 88%. Well done to everyone! This result was achieved because of the quality of the initial training that everyone receives, the support that all of the advice team are given by the session supervisors and their colleagues on the day and the commitment of the advice team themselves who continually update their skills and knowledge.

The bureau functions as a team and none of the advice work could take place without the support of the admin team who make sure we are supplied with all the equipment and resources we need. They also make sure that we have a well-trained and resourced reception team who make the running of an advice session so much easier.

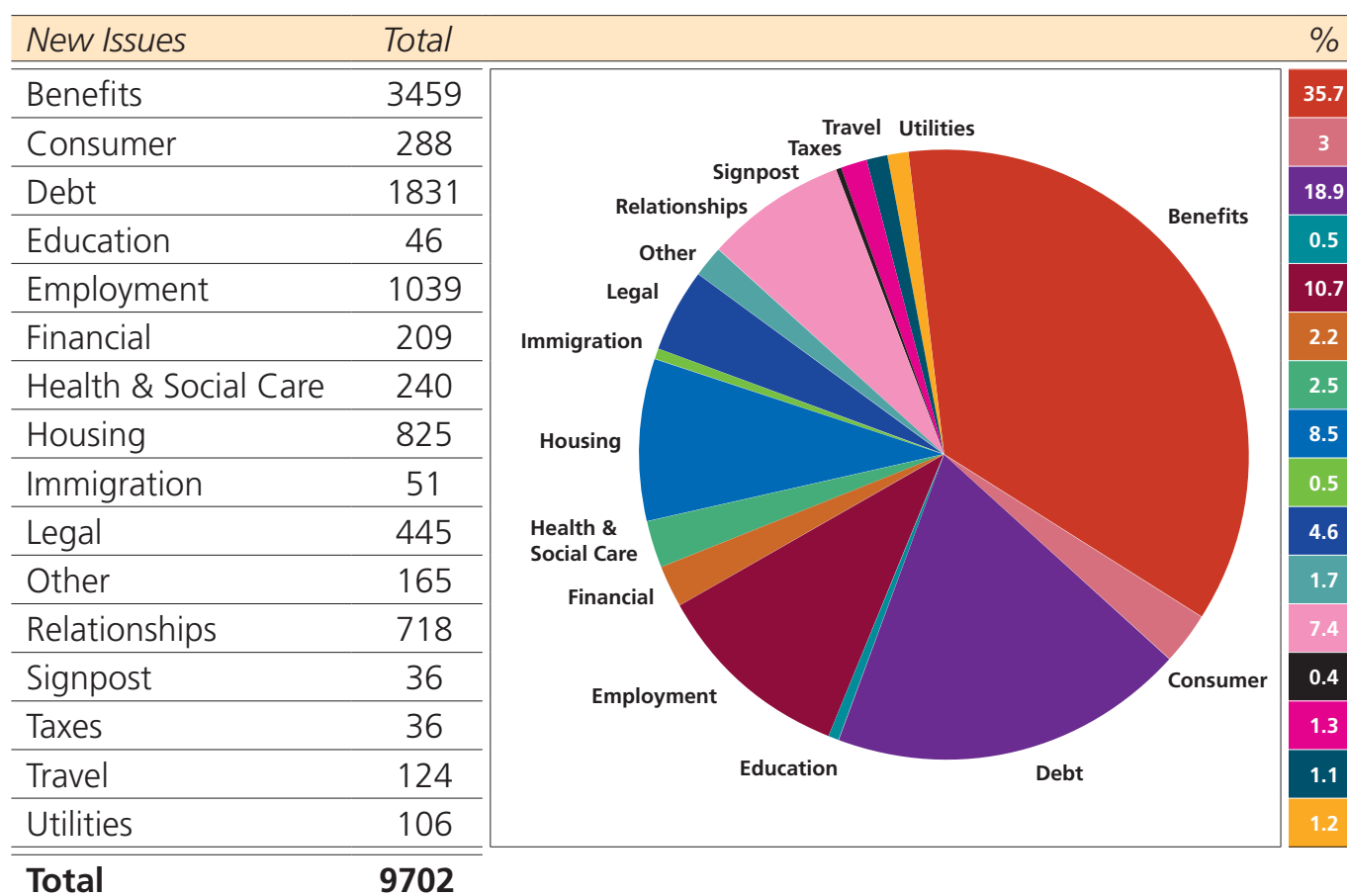
The need by people for advice and information is on-going but the way they want to access it is changing and our challenge in the next years is to continue to adapt our service to be accessible to anyone who needs it whether that is by phone, email, social media, or in person.



## Total new issues 2013-14



## Total new issues 2012-13



# Treasurers Report

Graham Hall



Total incoming resources for the year were £184,969 compared with £205,047 in 2012-13, a decrease of 10%.

This was primarily due to short term grants ending without replacements becoming available. Reserves were used to maintain existing services, particularly outreach, money advice and home visiting. Expenditure for the year-end was a deficit of £10,275 which compared with a surplus of £11,648 in 2012-13.

Some 390 hours per week are given collectively by our volunteers to the service. An independent assessment of those hours values the contribution at over £305,000 per annum.

The undertaking of East Dorset District Council to maintain the current level of grant for a further 3 years leaves the future more certain but at a lower level of funding. Other local councils and organisations are generally making every effort to maintain or increase their levels of support so that the charity should be able to continue to respond to the changing needs of the community through an increased reliance on volunteers.

Despite the fact that the charity is funded mostly by grants that are, at most, committed for three years and long term stability is, therefore, not guaranteed the Board takes the view that the financial position is not vulnerable in the short to medium term due to the level of reserve that have been achieved during periods of better funding.

Finally, we greatly appreciate the continued support of East Dorset District Council and all the local Town and Parish councils especially in these difficult financial times.

EDCAB would not function without the hard work and commitment of the Friends Committee and all the Advice and Admin volunteers and we thank them for their time and dedication.

2012-13	INCOME	2013-14
<b>GRANTS AND DONATIONS</b>		
89,800	East Dorset District Council	76,600
17,969	Macmillan	21,031
6,624	Friends of East Dorset	6,907
7,825	Dorset County Council	7,825
6,000	Primary Health Care Trust	6,000
4,000	Wessex Water	4,147
1,336	Client and General Donations	1,820
1,000	Wimborne and Ferndown Lions	1,500
731	North Dorset CAB	730
2,578	Dorchester CAB	0
797	North Dorset District Council	0
425	Training and Room Hire Fees	525
3,508	Citizens Advice	780
30,752	Big Lottery Fund	9,943
4,050	Taylor Energy Services	0
0	Corfe Mullen Childrens Centre	6,000
0	Rotary of Verwood	250
0	CAID - Healthwatch	4,313
5,362	Heatherlands Project	2,032
0	Advice Services Fund	9,959
0	Financial Capability	1,100
<b>TOWN COUNCILS</b>		
7,500	Ferndown	7,000
6,000	Wimborne	6,000
2,000	Verwood	2,000
<b>PARISH COUNCILS</b>		
1,000	Colehill	1,000
0	Corfe Mullen	1,500
440	St Leonards and St Ives	440
250	Holt	250
150	Cranborne	150
100	Alderholt	250
100	Knowlton	150
150	Sixpenny Handley and Pentridge	250
100	Sturminster Marshall	100
150	West Moors	150
250	West Parley	0
4,100	Bank Interest	4,267
0	Other Income	0
<b>205,047</b>	<b>Total</b>	<b>184,969</b>
<b>EXPENDITURE</b>		
136,414	Salaries, Pensions and NI	129,073
3,072	Staff Costs	8,860
19,897	Office Costs	26,272
25,966	Premises Costs	28,881
7,736	Other General Expenditure	730
593	Fundraising Costs	449
-279	Governance Costs	979
<b>193,399</b>	<b>Total</b>	<b>195,244</b>
<b>11,648</b>	<b>Surplus/Deficit Income over Expenditure</b>	<b>-10,275</b>
<b>BALANCE SHEET</b>		
<b>CURRENT ASSETS</b>		
175,000	Interest Bearing Accounts	160,086
22,673	Current Account and Cash	22,304
7,369	Debtors and Prepayments	6,608
-18,828	Creditors	-13,059
186,214	Net Assests	175,939
<b>Represented by:</b>		
0	Restricted Funds	5,590
139,910	General Reserve	123,549
16,304	Legal Liabilities Reserve	16,800
12,000	Staff Sickness Reserve	12,000
12,000	Premises Reserve	12,000
6,000	IT Replacement Reserve	6,000
<b>186,214</b>	<b>Total Funds</b>	<b>175,939</b>

# Employment

Gillian Dawson



*My fears that the introduction of high fees (£1200 for unfair dismissal cases) would result in injustice have been realised. It is facile to argue that the fee will deter those employees who do not have a strong case from taking one, because it does not address the very real issue of also deterring those employees who do have a case. The government needs to understand that good and bad attitudes can be found amongst both employers and employees.*

My work as specialist employment adviser covers both employment advice for my own cases and to give advisers guidance for their clients. A selection of case examples for the year shows the variety of situations presented:

- Client not allowed to return after maternity leave (discrimination on grounds of pregnancy or maternity)
- Suspension from work when client went to buy a sandwich at lunch time
- Abuse of power by a new manager at work
- Dismissal because of unsupported complaint by a customer
- Lay-off but no redundancy pay offered.
- Workplace conditions affecting chronic health condition

The work takes time; to discuss with the client; to help them achieve what they are hoping for; assessing the legal strengths of a case; and discussing alternatives to a legal challenge. One client, who was guided through a tricky situation at work, made our first (to my knowledge) public thank-you on the national Citizens Advice twitter account...how gratifying!

# Advice Session Supervisor

Ann Walker



*The role of an Advice Session Supervisor has many facets. The prime aim is to ensure the smooth running of the session so that advisers and assessors are supported and clients feel that their problem has been progressed. In addition to this is the need to ensure the quality of the recording of advice given and the maintenance of client records.*

In a typical day I open up the bureau in the morning and lock up in the evening, allocate appointments to the advisers on duty that day, if necessary discuss each case with the adviser before the appointment and monitor the information and advice given both face to face and over the telephone. I try to listen in to assessors manning the phones so that information is given accurately and speedily. I also make sure that clients who drop in without an appointment are attended to in turn and without too much delay and keep an eye on the bureau advice telephone for messages. Throughout the day I am available to advisers and assessors to discuss the advice/information given and sometimes help them to find appropriate items in the extensive resources available both online and in the bureau text books. Additional tasks can include resolving basic IT problems, logging incoming mail if no receptionist is available, answering the admin phone line and making coffee!

I measure the success of a day firstly by the level of satisfaction gained by clients and the sense of achievement felt by our advisers and assessors and secondly by the quality of the write-ups produced by everyone - and to some degree by being able to lock up before 6.00pm!

# Training Report

Fiona Wilkinson



# Social Policy Report

Gillian Dawson



*We've continued to train new volunteers this year in East Dorset CAB (three assessors and two advisers). The process of training to be a gateway assessor takes about six months; to become an adviser can take over a year. Much support is given by supervisors and experienced staff during the process. If you are interested in training for either of these roles, **please get in touch!***

On top of basic training, we use at least one hour of our monthly staff meetings for training purposes. This year we have included sessions on Trading Standards, employment, Healthwatch, welfare benefits and food banks.

We prepared for the introduction of Universal Credit (UC) and Personal Independence Payments (PIPs) in summer 2013. A number of webinars and external sessions helped. PIPs (replacing Disability Living Allowance for many adults) have started, but we'll have to refresh our knowledge on UC, as this has not yet come to Dorset.

IT training (extra coaching and support for working with Petra, a national CAB case recording system), was provided by Joan this year. Thank you, Joan.

In many other areas, we have used e-learning to update staff knowledge, as, with the exception of housing issues, affordable, face-to-face training is not readily available locally. CABlink, a national CAB website, has a dedicated training section for assessors and advisers. Staff are expected to work through a section of this each month to stay up-to-date.

In the future, we hope to tap into the local Dorset CAB group, CAID, for relevant group training on a variety of subjects.

*When the advisers cannot help a client because of the wider social context, the CAB's twin aim is to improve the policies and practices which affect people's lives.*

Sweeping policy changes made in the last year will continue to reverberate with its impact on individual clients down the years.

East Dorset CAB contributes to this work through the Dorset Citizens Advice social policy campaign group. The year's main project concerned the lack of affordable housing in Dorset. Policies which have produced this are welfare benefit restrictions, and the 'bedroom tax' where people in social housing who have larger accommodation than allowed have to pay an increased rent - ie a tax. In Dorset (and elsewhere) there is a lack of smaller properties for them. The 'catch 22' is that private landlords often refuse lettings to people who claim benefits.

For more information please visit; [www.eastdorsetcab.org.uk/](http://www.eastdorsetcab.org.uk/) and look for 'A Place to Call Home'.

Our debt adviser Karen completed more than one survey to show the iniquity of payday loan companies. One client took out a Wonga loan but did not understand that it had been turned into 3 further loans after the first one. The legislation introduced has not eliminated bad practices.

**Foodbank referrals** - a snapshot survey in September showed that we referred 5 Wimborne clients and one from Ferndown. The policies on welfare reform have resulted in people being unable to feed themselves or their families; the foodbank provides for 3 days of meals.





*The past year has seen me take on more projects as well as continuing with the original ones. I have continued visiting Heatherlands every Tuesday and Verwood Library alternate Thursdays. I started the year exclusively visiting Leigh Park on Wednesday but in early 2014 Corfe Mullen library was added on alternate Wednesdays. I also started at Verwood and Cranborne GP surgeries on Fridays. The Three Legged Cross surgery project came to an end in March 2013.*

## **Heatherlands**

Heatherlands is still very well attended; parents from the Stay & Play session ask advice mainly about benefits or housing issues. One lady was sanctioned for not attending an ESA assessment. She had not received the letter with the appointment. I helped her with an appeal to the Tribunal service which was successful without her having to attend a hearing.

## **Leigh Park & Corfe Mullen**

Leigh Park tends to be busy. April 2013 saw the Buggy Fit and the Stay & Play sessions end. However the centre is still very busy with the food bank and job club running, parents visiting the Health Visitor and it is used as a contact centre. I have a number of returning clients one of whom I assisted with a claim for PIP in June 2013; her Atos assessment was in November but she was not awarded the benefit until May 2014 meaning she had 11 months backdated. Corfe Mullen library session is run in conjunction with a Sure Start Stay & Play session but is not yet very busy but it is still early days.

## **Verwood Library**

Verwood Library continues apace with clients' problems ranging from poorly administered Pension Credit claims to neighbour and boundary disputes.

## **Verwood and Cranborne GP Surgeries**

These run on an appointment basis and I regularly see 4 clients for half an hour each. At Verwood I am housed in the old dentist consulting rooms which in winter is very cold as there is no heating so I 'borrow' the heater from the waiting room which is shared with the Podiatrist. New clients don't realise where I am and sign in on the electronic system so I have to go across to the surgery and winkle them out of the waiting room. In Cranborne I am upstairs which causes some clients difficulties. At these 2 surgeries many of my clients are people who are unable to travel further afield so we are truly reaching out to the wider community.

I continue to represent clients at benefit appeals Tribunals. Clients are usually very grateful for the support I provide just by my mere presence and normally cope very well with the questioning from the panel. Although of late there have been fewer appeals due to Atos scaling back their operations.

# Macmillan

Mandi Douglas



*The Dorset Macmillan CAB service helps people with cancer and their families. This is my third year as a Macmillan Welfare Adviser, covering a wide geographical area including East and North Dorset, Purbeck and Christchurch.*

Referrals come mainly through health professionals but clients can self-refer. We give some advice by telephone but the majority of clients are still visited in their own homes. Over the last year I have seen around 100 cancer patients. Often they are still undergoing treatment and struggling with illness and fatigue, along with all the emotional upheaval that a cancer diagnosis brings.

A large part of our work is around benefits, assessing entitlement, and completing applications. A high proportion of clients are unfamiliar with the complex benefit system particularly with all the recent changes. It is an added burden for them at an already difficult time, and we aim to support, assist and encourage clients to apply for financial assistance where eligible. We also help with grant applications, housing and employment problems, health costs and any other associated issues. Since the start of the project we have attained around 5 million pounds worth of benefits for Dorset residents.

We helped Ms A, a disabled single parent now also struggling with cancer. We were able to increase her Disability Living Allowance, Income Support and Housing Benefit which gave her an extra £191.75 a week! We also got a grant of £400 and a Blue Badge. This has significantly improved her life and she is very grateful.



# Healthwatch

Mandi Douglas



*Healthwatch is the new consumer champion for health and social care services.*

All the CABx in Dorset are now part of Healthwatch. Our main purpose is to provide information and advice to the public on health and social care issues. This ranges from simple queries such as 'How do I find a dentist?' to more complex issues like 'How do I make a complaint about my hospital treatment?' All advisers and Gateway assessors are involved in this part of the project. Our second function is to collect patient feedback on their experiences within the health and social care system. Clients can do this by phone, email, post or in person at a CAB.

My role as the Bureau Lead involves overseeing the project and raising awareness of Healthwatch, both internally and externally. I study cases on our recording system PETRA, and report relevant issues anonymously to Help and Care who are analysing the data. I complete Social Policy Evidence forms which are then sent to national Citizens Advice. Currently we are collecting evidence of GP charges for medical reports to support benefit claims. I report on Healthwatch issues at daily Briefings, Staff Meetings and newsletters in the Bureau. I have organised promotional events in local libraries, and participated in others at a supermarket, hospital and an event for older people. I was recently part of a hospital inspection team looking at the care environment. My role as Healthwatch Lead is varied and interesting and I look forward to continuing.



# Friends of East Dorset CAB

Diann March- Chairman



*We were most grateful that Mary and Roger Angus once again asked the Friends to serve teas when they opened their garden for four Sundays under the National Garden Scheme and Mary generously donated the money she raised through the sale of some of her plants.*

An enjoyable afternoon was had by all the helpers when we served at Wimborne St Giles on August Bank Holiday Monday. We could not do all these events without those willing people who give up their leisure time to serve the teas, take the money, wash and dry up and those who bake such wonderful cakes.

Further monies were raised by volunteers participating in the Rotary's Swimathon and Tony Molloy pushed his partner Sharon in a wheel barrow, in pouring rain, to participate in the Santa Fun Run. For something different, a Concert by Poole & Parkstone Singers was held in October at Wimborne Methodist Church.

John Rynne once again organised a sell-out Jive Night.

Thank you to an active Friends Committee and everyone who volunteers to help at our various events, as it is only because of you we are able to continue to support this much needed facility in our community.

We had a very good year and wish to thank all those who gave subscriptions/donations and contributed to all events and money raising ventures.

Chairman	<b>Diann March</b>
Vice Chairman	<b>John Rynne</b>
Treasurer	<b>Chris Isaac</b>
Minutes Secretary	<b>David Morgan</b>
CAB Advice Manager	<b>Pat Temple</b>
Press Secretary	<b>Tess Moberly</b>
	<b>Pat Anderson</b>
Committee Members	<b>Derek Geldart</b>
	<b>Rachel Green</b>
<b>Ex-Committee</b>	
Treasurer	<b>Joan Taylor</b>

## The Friends raised over £7,000 from April 2013 to March 2014

<b>Income</b>	
Regular Subscriptions	£1,023
Donations ( <i>including £1500 from Salisbury Trust</i> )	£2250
Glade Teas	£481
Wimborne St Giles Teas	£331
Gift Aid on Previous year's donations	£809
Santa Fun Run	£264
Concert at Methodist Church	£246
Sale of Knitted Mice	£70
Swimathon	£395
Jive Nite	£1243
<b>Expenditure</b>	
Publicity and other small items	£45

# Contact us...



For **new enquiries** please phone the **DORSET ADVICELINE 0344 245 1291** or from mobiles **0300 3300650** between 9.30am and 4.00pm Monday - Friday call in at one of the following places for an initial assessment...

## Wimborne Citizens Advice Bureau

Hanham Road, Wimborne, BH21 1AS

MONDAY	10.00am - 3.00pm
TUESDAY	10.00am - 3.00pm
WEDNESDAY	Appointments only
THURSDAY	10.00am - 3.00pm
FRIDAY	10.00am - 1.00pm

## Ferndown Citizens Advice Bureau

1A Princes Court, Princes Road, Ferndown, BH22 9JG

MONDAY	10.00am - 3.00pm
TUESDAY	10.00am - 3.00pm
THURSDAY	10.00am - 3.00pm

## Citizens Advice Bureau Outreach

### HEATHERLANDS

The Heatherlands Centre, Barns Road, Ferndown, Dorset BH22 8XH

*2nd and 4th Tuesday of each month  
9.30am - 12.00pm*

### WIMBORNE

Leigh Park, Children's / Community Centre

*1st, 3rd and 5th Wednesday of each month  
9.30am - 12.30pm*

### CORFE MULLEN

Corfe Mullen Children's Centre and Library, 54 Wareham Road, Corfe Mullen, Wimborne, BH21 3LE

*2nd and 4th Wednesday of each month  
10.00am - 12.00pm*

### VERWOOD

Verwood Library, 1 Manor Road, Verwood, BH31 6DS

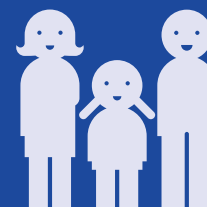
*1st, 3rd and 5th Thursday of each month  
10.00am - 12.30pm*

Email us at: [advice@eastdorsetcab.org.uk](mailto:advice@eastdorsetcab.org.uk)

Information and advice is also available at; [www.adviceguide.org.uk](http://www.adviceguide.org.uk) or [www.eastdorsetcab.org.uk](http://www.eastdorsetcab.org.uk)

Charity Registration No. 1003456  
Company Limited by Guarantee No. 2618707

# Staff and Volunteers



## Management and Paid Staff (p/t)

District Manager <i>(shared with North Dorset)</i> .....	<b>Tony Molloy</b>
Advice Manager.....	<b>Pat Temple</b>
Advice Session Supervisors .....	<b>Ann Walker</b>
.....	<b>Sylvie Mitchell</b>
Money Adviser.....	<b>Karen Hancock</b>
Training Supervisor .....	<b>Fiona Wilkinson</b>
GP Adviser.....	<b>Sophie Brown</b>
Heatherlands Outreach Adviser .....	<b>Sophie Brown</b>
Macmillan Welfare Benefits Caseworker .....	<b>Mandi Douglas</b>
Healthwatch Bureau Lead .....	<b>Mandi Douglas</b>
Office Manager.....	<b>Juli Brown</b>
Administration Assistant .....	<b>Julie House</b>

## Volunteers

Mary A	Ian L	Joan T
Patricia A	Dawn M	Sue T
Andrea A	Joy M	Kay T
Barry B	John I	David T
Christine B	John M	Shelley T
Lindsay B	Judy M	Rose T
Jan B	Lesley M	Gill W
Mandy B	Graham P	Barry W
Ruth B	John Pa	Jill W
David C	Jane P	Amanda W
Gillian D	John P	
Jean D	Denise P	<b>Resigned/ retired during the year</b>
Christine F	Roger P	
Geraldine F	Carol P	Kevin B
Jane G	Jean R	Helen B
Rachel G	Jeannette R	Angie H
Alastair G	Brian S	Gill J
Linda G	Elaine S	Mandy S
Eddie H	Monika S	Lyndsey T
Alan H	Anthony S	Elayne W
Ann J	Beryl S	
Anna K	Ian S	
Brian K	Valerie S	

