



**2016**



# **Annual Report**



**citizens  
advice**

**Rotherham  
& District**



In 2017 Rotherham Metropolitan Borough will become part of the Sheffield City Region. The City Region builds on a long history of collaboration between the nine local authorities, from 2010 and the formation of the Local Enterprise Partnership. The benefits of collaboration can be seen in the securing of a Devolution Deal amounting to £484m (2016-2021). This covers a range of themes including skills and employment; housing, planning and

## Chair

**"It gives me  
opportunity to feel  
I'm doing some-  
thing worthwhile  
again"**



Having only joined Citizens Advice Rotherham at the end of July 2016 it is difficult for me to write too much about how the service did in 2015/16. When you look at the statistics and compare those to previous years you will see there has been a gradual increase in the numbers of clients helped year on year, a trend we plan to continue in 2016/17.

What is clear to me, looking back over the last few years and also reviewing the current service delivery and how we deliver advice, is that there is both a need and an opportunity to improve our service offer, taking advantage of new technology and systems to deliver more for the funding we receive. Demand has consistently outstripped supply, at a time when funding levels have been reducing and local Citizens Advice have carried the brunt of shifting demand patterns, because publically funded services have seen the heaviest cuts. Looking forward I can only see more of the same over the next few years, with Rotherham Metropolitan Borough Council (RMBC) facing cuts of a further £42m next year, equivalent to 21% of their total annual budget.

This gives us an opportunity to reflect on how we are delivering advice services to the local community, taking into consideration local priorities, gaps in service and our own ability to rise to the challenges faced across the sector by finding new ways to do more for those in greatest need. To that end we are currently undertaking a root and branch strategic review of our services, looking at everything from how we provide advice, use our volunteers and our opening hours. In the future it is essential that we are able to deliver high quality advice that is accessible to all, while working in partnership with other Third Sector organisations, to deliver on key RMBC priorities. At a time when our core funding is

up for review it is essential that we position our service as the go to agency that solves people's problems, adopting a 'can-do' positive approach to partnership and delivering on our service promise.

The next 12 months will be critical in many ways, but if we succeed in shaping our vision for the future of our service, we will be ideally placed to take advantage of the opportunities these times of uncertainty often present organisations. The exciting thing is that Citizens Advice Rotherham has as an excellent base of great staff and volunteers, operating from a good central location, the combination of which will enable us to play a key role in strengthening our community in the coming year.

Nick Bussey

CEO

**"To improve  
the community  
closest to me"**

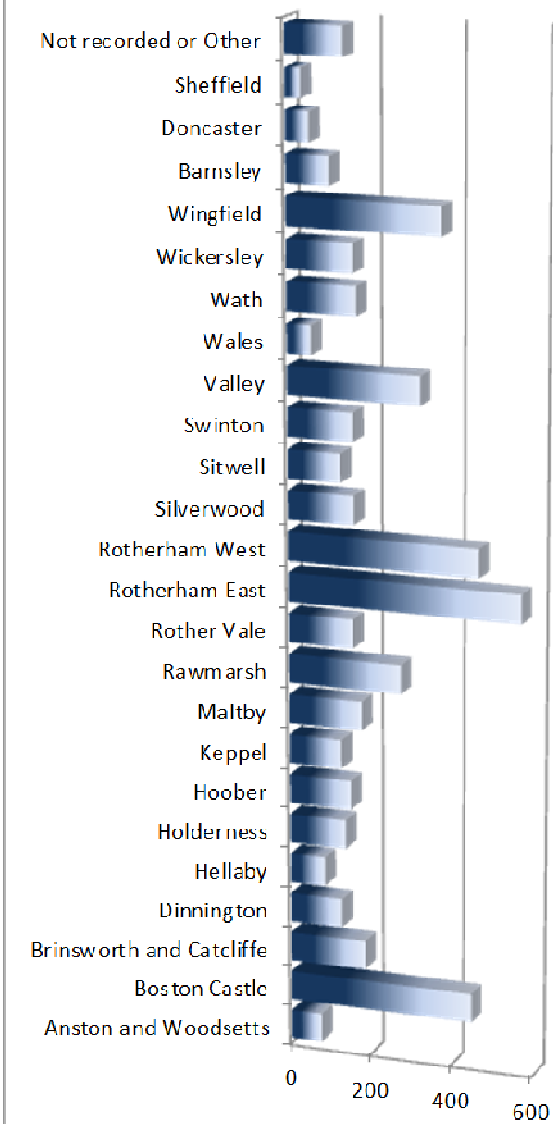


**"Get out of  
the house"**

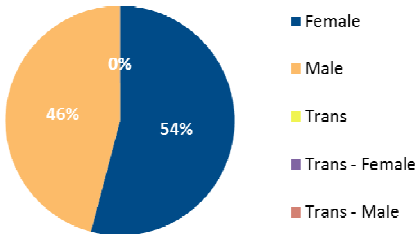
Key Statistics

Clients	5,531
Advice Issue Codes	23,523
Client Contacts	16,775
Enquiries	6,152

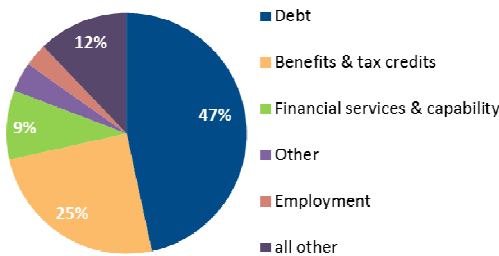
Clients By District



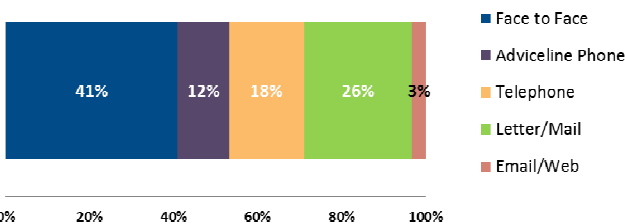
Gender of Clients



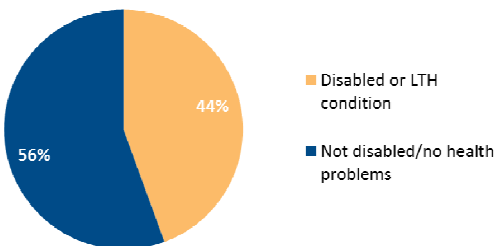
Advice categories summary



Client contacts by channel



Disability / Long term health (LTH)



With a new Training Supervisor and a new building, volunteering and training has seen some significant changes this financial year.

Interest in volunteering with us has remained high with just over 90 people getting in contact with us to find out more before applying. To help with this demand, for the first time, group Information Sessions have been held every two months in the new, more spacious, Training Room. These structured and interactive sessions aimed to provide potential volunteers with all essential information about our service, role opportunities and what it is like to volunteer with us before they decide to apply. We delivered eight sessions with just over thirty people attending. Just under half of those people were selected to join us.

The new Information Room meant we could offer a new volunteer role - Information Assistant. This role would assist the client in identifying self-help information, whether by phone, online or leaflet. The role provides an extension to the volunteer reception role and also a good starting point for those training to become Gateway Assessors.

This new role, and the new more spacious building, allowed us to re-look at the training programme and re-design it with the aim of moving people through the Citizens Advice Training Programme efficiently and effectively with the main aim being to fulfil the need of the Adviceline service before moving on to become Advisers.

A nine stage programme was created with each stage requiring a group of trainees to complete it within a week (except stages 8 and 9 which may require longer). The training at each stage would involve completing packs, e-learning and Learning Journals, attending a workshop and shadowing experienced staff/volunteers. The Information Assistant Stage would require the trainee to volunteer as an Information Assistant whilst continuing training in further stages. The idea being that the next group of trainees would then take

over the Information Room as the previous group move on to Adviceline.

A total of 38 people joined the 9 stage training programme which was split into 7 different groups throughout the year. 15 of these people completed the programme and volunteered on Adviceline. 6 of these achieved competency on Adviceline. 7 people left for employment and 2 left for University/College.

Later on in the year, stages 10 to 17 were developed for those who had completed stage 9 and were experienced enough on Adviceline to move on to training to become an Adviser. 3 volunteers (and also 3 members of staff) joined the programme and are still currently working their way towards the final written assessment - The Johnson Family - before starting on the Generalist Rota.

These changes have been positive and have seen a significant increase in the number of volunteers moving through the training and beginning a role. We recognise, through evaluation, that more changes to the detail of the training and assessment need to take place to continue to contribute to the quality of the training and, therefore, the service.

As always, we want to say a great big THANK YOU, to everyone who has volunteered with us during this year. We really couldn't have done it without you.

Laura Wagstaff

Volunteering and Training Supervisor

Between April 2015 and March 2016 we continued to delivery an Outreach service at Ferham Childrens Centre, Greasbrough, Mowberry, Swinton and Wath Libraries for Generalist Advice to ensure that our service was more accessible to the public. We offer appointments at the majority of these venues but we also see people when they pop in wanting assisted information or who wish for us to book an appointment at our main office.

The generalist advice part of our service is equipped to deal with all areas of social law and over the year we dealt with over 23,000 client issues, Welfare Benefits and Debt still remain the main issues for people needing to access our service.

The Emergency Drop In has been as busy as ever in the period April 2015 to March 2016 doing Face To Face Gateways for people mainly experiencing difficulties due to their benefits being stopped e.g. due to sanctions or needing further assistance due to having financial difficulties. During this period we have also seen an increase in the number of people needing Food Parcel Referrals than the previous year.

Energy Best Deal Extra exceeded its targets again seeing over 90 clients who would like to either switch suppliers, experiencing some kind of issue with their utility provider or wanting assistance to maximise their income due to fuel poverty.

The Social prescribing Project has been a great success seeing 88 clients which have been referred via their GP as due to their medical conditions were unable to access our service directly, through this project we are able to do Home Visits to ensure that they were accessing all benefits they were entitled to and deal with any other issues they may have been experiencing.

We are still seeing clients with Immigration issues unfortunately due to lack of funding,

Jose who is a level 2 Immigration Adviser can only offer appointments on one day a week.

This period also saw a lot of Disability Living Allowance to Personal Independent Transitions, so Joan and Cath who have been with us for many years have been kept really busy with both new claims for PIP and people who are being switched from DLA to PIP. These appointments are still in great demand and get booked up very quickly.

We would also like to thank all our volunteers who have joined our team throughout this year, a few of whom were only able to give us their time for a short period, and once again a big thanks to all the staff on the Generalist Team, who worked extremely hard to ensure as many clients could be seen as possible; keep up the good work.

Sandi MacPhearson

Generalist Advice Supervisor

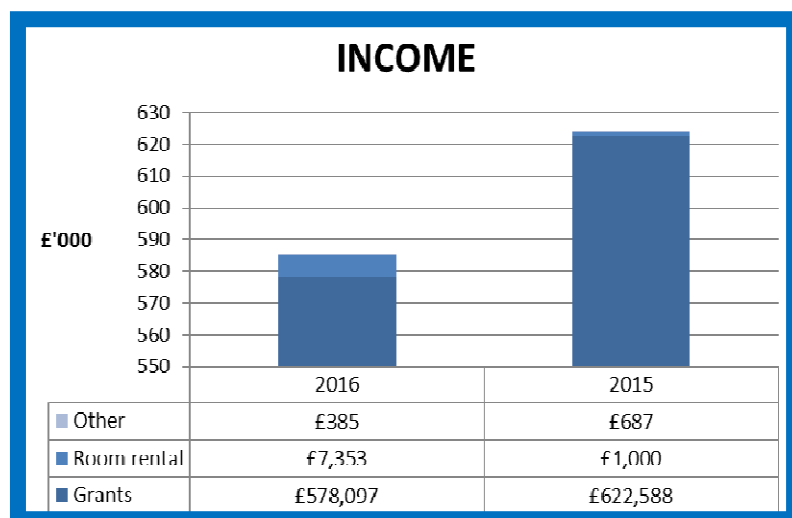
**"I enjoy working here with nice people friendly environment "**



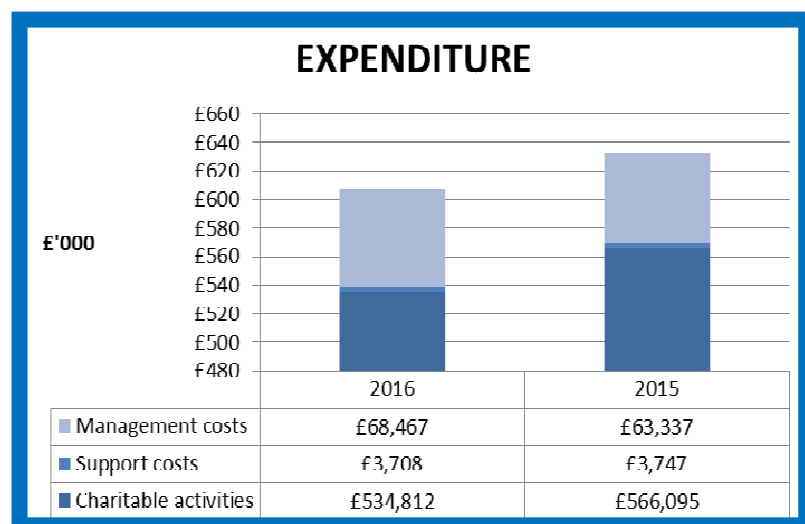
# A Summary Of Our Finances

We received £585,835 in income, mainly from grants and spent £606,987, resulting in a deficit for the year of £21,152.

Our income was £38,440 lower than in 2015



Our costs for the year also reduced, but only by £26,192.



Our reserves fell from **£152,440** to **£131,288**.

	2016	2015	Change
<b>Restricted funds</b>	<b>5,026</b>	<b>7,696</b>	<b>-34.7%</b>
<b>Unrestricted funds</b>	<b>126,262</b>	<b>144,744</b>	<b>-12.8%</b>
<b>Total funds</b>	<b>131,288</b>	<b>152,440</b>	<b>-13.9%</b>



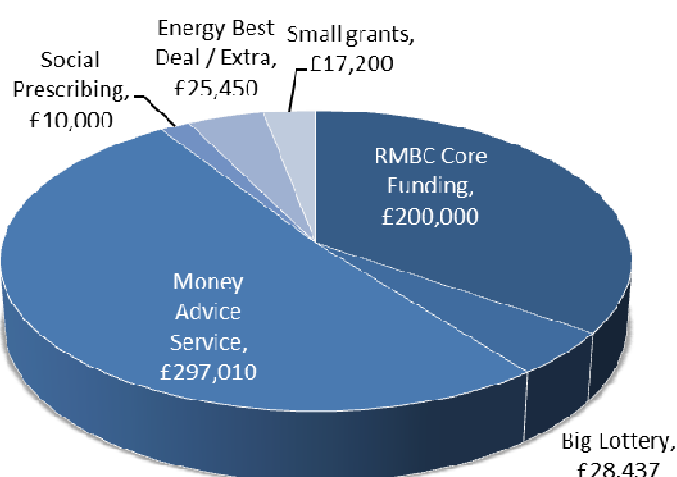
# A Summary Of Our Finances

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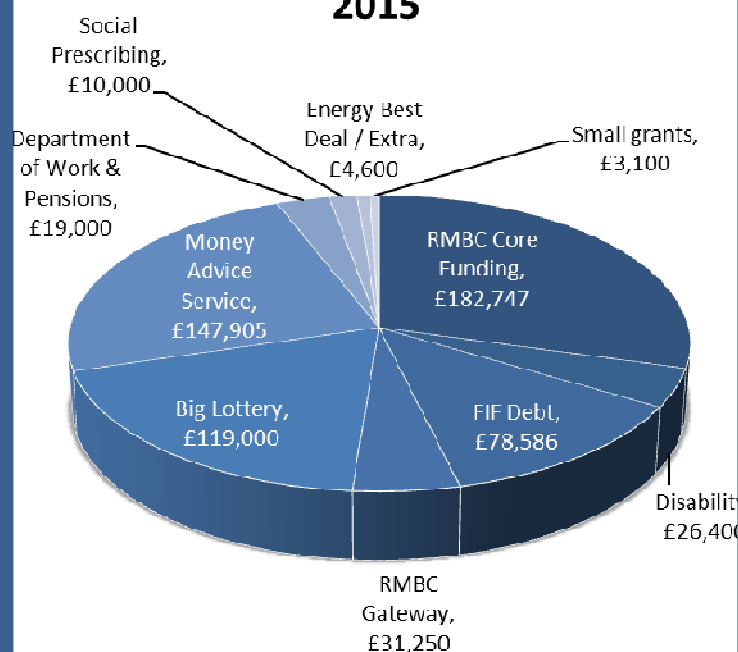
Our main source of income is from grants, and although we had more income from some funders, notably RMBC Core Funding and Money Advice Service, we received fewer significant grants.

**2016**



**2016:  
Total grant  
income  
£578,097**

**2015**



**2015:  
Total grant  
income  
£622,588**

This year Citizens Advice took on new branding and we were awarded a £700 grant to become early adopters of the new brand. The grant was to be used to facilitate the purchase of the new Citizens Advice brand materials, the rebranding of internal process and devices and web development to align with the new brand.

As part of our tender contract with the Local Authority we took on out of hours opening. These hours were initially run on a Saturday morning. However this did not work as well as we initially expected and some of the clients' booked in did not turn up for appointments. We decided to consult with the local authority to move the out of hours opening to a Thursday evening. This has worked much better than the Saturday morning opening.

Citizens Advice Rotherham were also early adopters of the new quality advice audit. This is a process where our advice is monitored for quality on a monthly basis by senior members of the staff team. This in turn is monitored on a quarterly basis by Citizens Advice Auditors. Since taking this on Rotherham has gone from strength to strength and we ended the year with a score of 88% for quality of advice.

Unfortunately the year was marred by serious long term sickness leaving the bureau very short staffed. Commendation has to be given to the staff and volunteers left in the bureau that stepped up to the mark and kept the bureau running ensuring we hit our core targets despite the staffing shortages.

This year also saw the resignation of our Chief Executive Officer Annette Cassam. We thank her for her ten years' fruitful service and wish her all the best for the future.

Marie Ball

Service Development Manager

**"To repay the help and kindness I was given in my time of need"**



**"I Enjoy being with friendly supportive colleagues"**

This year has had its challenges

Because of the need for debt advice locally Citizen’s Advice Rotherham has had its Money Advice Service debt funding increased to provide 6 Full Time Equivalent caseworkers.

It has been difficult to recruit the right people for this and it is only recently that we have had a full complement of staff to meet the needs of the contract. We have also been affected by illness within the MASDAP team.

We now have a strong team and are able to see clients at short notice.

We have been constantly updating systems in order to make referrals and advice slicker and avoid delays, improving the client “journey” etc.

Recently my own caseload has been reduced to free me up for supervisory duties, of which there are many, and to ensure quality of advice is maintained and also to provide more on-going support to the other caseworkers; further increases in resources due to restructuring and other changes which are on-going or pending will provide the time and tools for the job.

It is essential that other partners / stakeholders continue to refer or signpost clients to us and provide feedback where appropriate, as we will also provide appropriate feedback to referring agencies as appropriate.

Steve Foers

Debt Supervisor

Average debt per client

£5,916.59

Total of debts dealt with

£5,502,424.35



“To help improve my self-esteem”

“You are all a great team to work with”

“To make Friends”



## Trustees

R Newman  
R Boocock  
N Latif  
C O'Toole  
J Rhind  
N Kitchen  
L Whyke

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J Fields  
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D Green  
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J Nsimba  
N Price  
B Race  
S Rowley  
J Shaw  
K Shemeld  
L Wagstaff  
J Willoughby  
G Wharton  
P Wright

## Volunteers

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I Donnison  
J Eaglestone  
M Jones  
G Long  
J Long  
S Moore  
D Norry  
J Nur  
S Poskitt  
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C Shemeld  
C Sylvester  
J Vernon  
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## **Citizens Advice Rotherham & District**

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