

# Citizens Advice South Somerset Annual Report

## 2021-22



### Being here for our clients

**10,252** clients advised  
(up by 31% from 2020/21)

**£3,517,597** benefits income gained for clients

**£820,936** of clients' debt rescheduled  
or written off

**1,628** clients issued Household Support fund

### Volunteer advisers

**36** experienced volunteer advisers

**8** trainee volunteer advisers

**3,618** clients advised by the volunteer team

**£136,207** wage equivalent from Volunteer's  
value



### Using technology to bring specialists onboard

**464** clients with mental ill health were advised

**175** clients with mental ill health were  
supported to access specialist debt advice

**34** clients were supported through the Mental  
Health Breathing Space option

### Getting back out into the community

**Yeovil Foyer • Westfield Community Centre  
St Margaret's Hospice • Forefront Chard**

**6%** clients began advice face-to-face

**66%** of clients began advice by phone

**11%** of clients began advice by email

**17%** of clients began advice via a referral



## Contents

..... Chair's Report	3
..... Treasurer's Report	4
..... Statement of Financial Affairs	6
..... CEO'S Report	7
..... Objective 1	9
..... Objective 2	11
..... Objective 3	12
..... Objective 4	16
..... Objective 5	17
..... Operations Report	18

# Chair's Report

..... Lin Cousins

2021/22 was another year of challenge for so many people across South Somerset. It began as the country was in a phased exit from lock down and the economy had started to open up, and it ended with the beginnings of a surge in the cost of living. This has led to increased pressure on our organisation, as more and more people in South Somerset face economic hardship, with many unable to afford even the basics.



To tackle these issues, we have continued to develop a network of projects that meet the needs of our community, including those of people facing unemployment, severe mental illness and other limiting health conditions. Our work with our clients brings enormous benefits to them as individuals and a total gain in income for the area of over £3.5m. This is a great achievement for an organisation of our size.

2021/22 was also marked by an increase in joint working with the other Citizens Advice serving Somerset. This has made us a more resilient service, able to offer a wider range of specialist services while also improving the way we provide our general advice. This puts us in a strong position for the future as we plan for the move to a single unitary council that happens next year.

We are very grateful to our funders, both those who have been long-term supporters of our work, including the District Council, and new funders that we have started working with and are looking forward to a long-term relationship.

As always, none of what we have achieved would have been possible without the fantastic work of our staff and volunteers. The team has met the challenges of the Pandemic and all the changes to work patterns and demands on them with enormous energy and ability.

Thank you.

Kim Watts, Client Services Manager, receiving the High Sheriff of Somerset Award for services to the community





# Treasurer's Report

..... Margaret Mercer



For many years we have achieved a steady and modest growth in our income. However, for the past two years, we have reported a significant rise with income in excess of £800,000. In 2021/22 our total income rose again and was £1,040,800, an increase over the previous year of £159,199.

The increased income was due to additional projects - most notably the distribution of the Household Support Fund on behalf of Somerset County Council. (The Household Support fund was a government scheme to provide help for households struggling to manage their essential costs).

Other new income secured during the year related to discrete projects intended to boost our capacity to help increased numbers of clients needing advice due to the impact of the Covid-19 pandemic. These projects included a Somerset-wide initiative, Sustaining Advice Services (increasing capacity on Adviceline), and additional resource in our housing and debt service funded by the District Council.

## Staff Costs

There have not been any major changes to the expenditure profile of the organisation and, as usual, staff costs are our biggest expense, amounting this year to 74% of expenditure. For the first few months of the financial year, most of our staff and volunteers worked remotely. As a result of the pandemic and, in common with other charities, we reviewed our contractual terms to enable our staff to enjoy flexible working so that a percentage of the working week does not have to be office-based.

## Premises and Resources

Expenses during the year included the licence fees for the use of cloud-based office systems and VOIP phones and additional investments in IT upgrades. These are aligned to our Business Plan and are vital to ensure that we adhere to best practice in cyber security. Other costs in the year reflect our gradual move back out into community and the resumption of face-to-face advice interviews. We are committed to offering our clients a fully accessible service and recognise that in order to do so we must allocate funds across all advice channels (telephone, digital and face-to-face). As a result, our overall costs increased compared with 2020/21.

## Assets

At year-end our fixed assets were valued at £2,606 and it remains our policy not to capitalise expenditure on small items of office equipment. At the end of the year, we held cash of £474,133 and reserves of £406,514. Reserves are made up of designated funds of £169,692 and unrestricted funds of £236,822.

## Treasurer's Report (cont.)

### Reserves and Reserves Policy

We maintain a level of reserves to enable us to manage uncertainty. The retained reserves are intended to provide a buffer against funding cuts and a contingency to meet unforeseen expenditure.

The move to a single Unitary Authority for Somerset may mean we will incur significant changes to some of our funded programmes. In order to sustain our activities over the next 2-3 years we reviewed our reserves policy, and the Trustees approved an increase in the designated provision from £108,000 to £169,692. This is for contractual liabilities and provision for moving at the end of the current lease on Petters House.

In addition to the designated reserves, the Trustees have agreed a general reserve to cover approximately three month's running costs.

## Positive Impact of our Work



"I was worried sick with an on going problem and CASS' help was a god-send. I am grateful for the staff's continued patience and perseverance in helping someone like me with my complex case. Thank you. I sincerely mean that"

"My adviser assisted myself and my daughter with a Personal Independence Payment appeal this week. The humanity, speed and efficiency in which he acted has been exemplary and I sure you know this already but he is a credit to your organisation. We were in a tight fix time wise and he jumped on this immediately and charged in to save the day. If more people were like him life would be so much easier. Thank you"



"My debt adviser has done a job in a million to help me resolve the problems I had. There was no way it could have been sorted without her expertise. I thank god for the first day I spoke to her it was such a relief to me, I can't praise her and CASS enough for all the fantastic work on helping me. A massive thank you"

# Statement of Financial Affairs

..... Including an Income & Expenditure account  
For the Year Ended 31 Mar 2022

Income from	Notes	Unrestricted Funds/£	Restricted Funds/£	Total 2022/£	Unrestricted Funds/£	Restricted Funds/£	Total 2021/£
Donations & general grants	2	193,592	30,000	223,592	207,482	30,000	237,482
Charitable activities	3	102,187	714,268	816,455	68,221	575,132	643,353
Other trading activities		-	-	-	-	-	-
Investment income	4	433	-	433	444	-	444
<b>Total income</b>		<b>296,212</b>	<b>744,268</b>	<b>1,040,480</b>	<b>276,147</b>	<b>605,132</b>	<b>881,279</b>
Expenditure on							
Charitable expenditure	5	207,233	744,268	951,501	191,698	605,132	796,830
<b>Total expenditure</b>		<b>207,233</b>	<b>744,268</b>	<b>951,501</b>	<b>191,698</b>	<b>605,132</b>	<b>796,830</b>
Net income/(expenditure) before transfers		88,979	-	88,979	84,449	-	84,449
Transfer between funds	11	-	-	-	1,757	(1,757)	-
<b>Net movement in funds</b>		<b>88,979</b>	<b>-</b>	<b>88,979</b>	<b>86,206</b>	<b>(1,757)</b>	<b>84,449</b>
Reconciliation of funds							
Fund balances at 01 April 2021		317,141	-	317,141	230,935	1,757	232,692
<b>Fund balances at 31 March 2022</b>	<b>11</b>	<b>406,120</b>	<b>-</b>	<b>406,120</b>	<b>317,141</b>	<b>-</b>	<b>317,141</b>

The results for the year derive from continuing activities and there are no gains or losses other than those shown above.

The statement of financial activities incorporates the income and expenditure account.

# CEO's Report

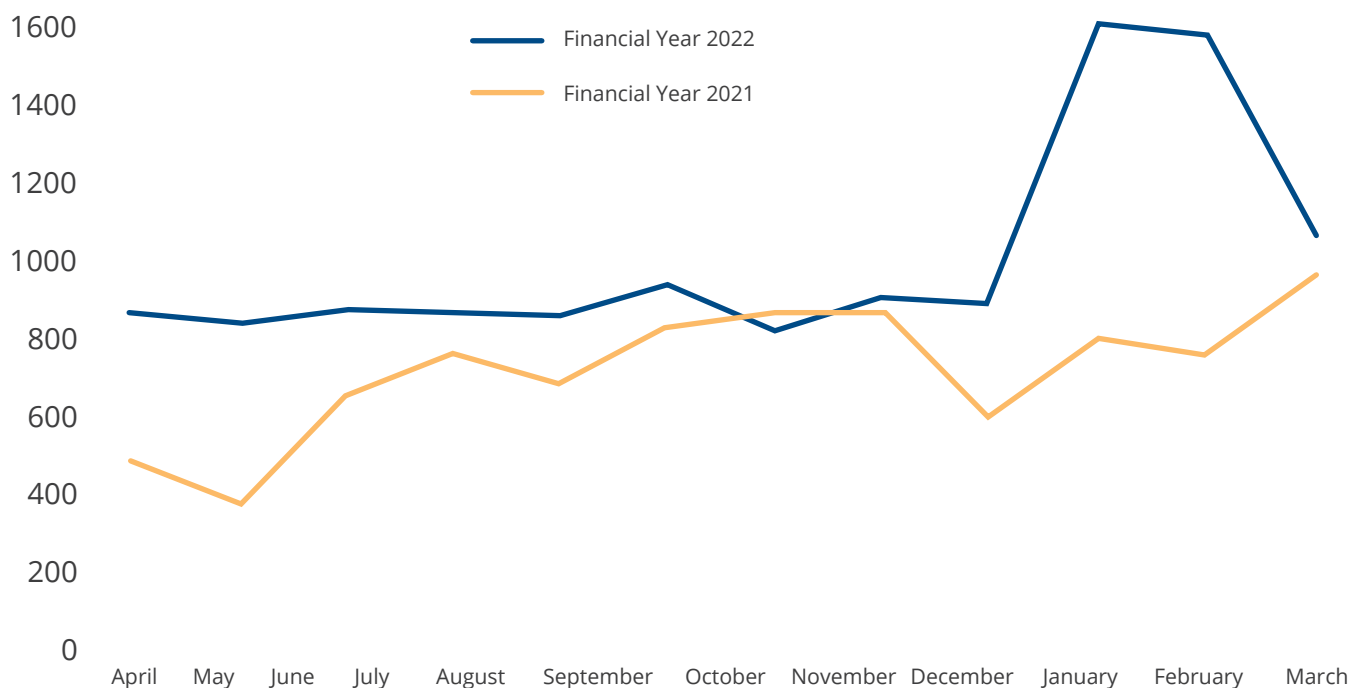
..... Angela Kerr

I closed last year's annual report by reflecting on our team's positivity and drive, noting how much we'd achieved for our clients despite all the challenges we faced. It is with great pride that I present yet another exceptional year, where we increased the number of clients helped by 31%, having advised over 10,000 people and secured income gains for them in excess of £3.5 million.



There were some noticeable changes for our clients over the year with increased numbers of people living on very low incomes (under £999 a month) and needing help with money problems, rent arrears and making benefit claims. Over the course of the year the "cost of living crisis" began to unfold and we saw many more people turning to us for advice as they were struggling to afford their heating and food bills.

## Change in Client Demand Levels comparing 2020/21 with 2021/22



Our business plan commits us to a set of service objectives aimed at meeting the diverse needs of our community. These ensure that we focus on providing accessible advice for everyone alongside targeted interventions for the most vulnerable.

An important aspect of our community service is the provision of general advice (covering a wide range of topics) that is easily accessed by phone, email or in person. It is vital that everyone can engage with help when they need it because if people's problems are not resolved their health, well-being and finances suffer. What is especially important about this service is the fact that we offer immediate assistance when needed and follow-on specialist help for those with complex

problems including financial distress. We are extremely thankful to our general advice service funders including the Corton Hill Trust, South Somerset District Council (SSDC), Crewkerne Town Council, Somerset Community Foundation and Public Health Somerset as their support has enabled us to scale up operations and help more clients. The funding allowed us to increase the number of volunteer advisers supported (training and supervision capacity), expand our phone and email services and re-open face-to-face appointments in communities of highest need.

Often clients present in the general advice service with several interlinked problems (employment dispute leading to loss of income causing rent arrears). We offer these clients additional help through our specialist caseworkers. In the last year we secured increased funding through Talking Money (Money and Pension Service) and SSDC that allowed us to expand our debt and housing teams. As a result we helped many more clients than in previous years who were in debt, at risk of homelessness or in need of essential assistance (food, fuel costs and the Household Support Fund).

The range and number of discrete projects we ran last year enabled us to engage record numbers of vulnerable clients. This work would not have been possible without the generosity of our funders and we would like to thank the Henry Smith Foundation, Macmillan Cancer Support, Open Mental Health Somerset and the MS Society. These grants covered the costs of specialist caseworkers who offered individualised services that were responsive to clients' circumstances and support needs (long term health conditions, physical disabilities, life limiting illness, mental ill health).

An area of particular growth over the last year was the Open Mental Health programme – a Somerset wide multi-agency initiative. Our membership of this alliance has enabled us to bring access to advice into acute and community mental health provision. As a result people living with severe mental illness have benefited from a more tailored service and this has greatly improved their health and advice outcomes.

Our greatest asset is our people (staff, volunteers and trustees) and the team grew over the year welcoming three new advisers, eight volunteer trainee advisers and one new trustee.

During the year we introduced new measures in order to ensure that our teams were:

- supported (Wellness Action Plans, Clinical Supervision and Hybrid Working)
- well equipped (move to MS365 cloud based office and phone systems)
- actively involved in shaping the future of the service (What Next and How consultation).

The Annual Away Day in November 2021 was our biggest and most successful yet, providing valued training and skills sharing workshops alongside celebrations of individual and collective achievements.

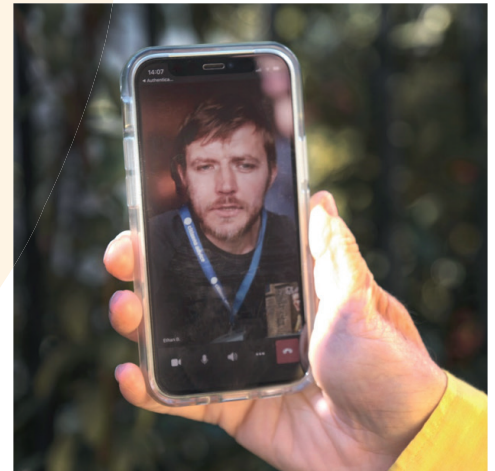
We continued our commitment to partnerships and collaboration over the last year and were delighted to host an agencies' Winter Wellbeing event aimed at connecting up our respective support for people struggling with their finances. In addition to our other established partnerships, we joined the Thriving Communities Social Prescribing Project led by Spark Somerset which enabled



## CEO's Report (cont.)

us to develop closer connections with GP practices. These relationships have helped us to improve access to advice and we have seen increased numbers of health coaches using the Citizens Advice in Somerset referral portal to seek help for their patients.

One of our longer term collaborations has been an initiative to improve the sustainability of advice services in Somerset. Over the last two years we have worked with the other local Citizens Advice and our respective District and County Councils' funders to produce a core service specification. This has enabled us to scale-up joint working and as a result we now co-produce Adviceline in Somerset. It has been hugely helpful to streamline the general advice service as this ensures that clients are offered the same level of service and a smoother transfer into specialist help wherever they live in the County. Other benefits from this work relate to opportunities for centralised volunteer recruitment and adviser training, shared supervision and rota planning and joint impact reporting.



Towards the end of 2021, Citizens Advice in Somerset were approached by the County Council to help distribute the Household Support fund. Although the contract was held by us at South Somerset, we worked together to design and launch a Somerset application portal and between the 5 local Citizens Advice distributed £1,493,180 to 5,947 households who needed help with essential costs. The work we did in Somerset has been held as a model of best practice and several other Citizens Advice organisations are now using the online portal in their own areas to distribute funds.

### 1. Increase the capacity and effectiveness of the general advice service

..... **This year we supported 10,252 clients with advice and specialist casework.**

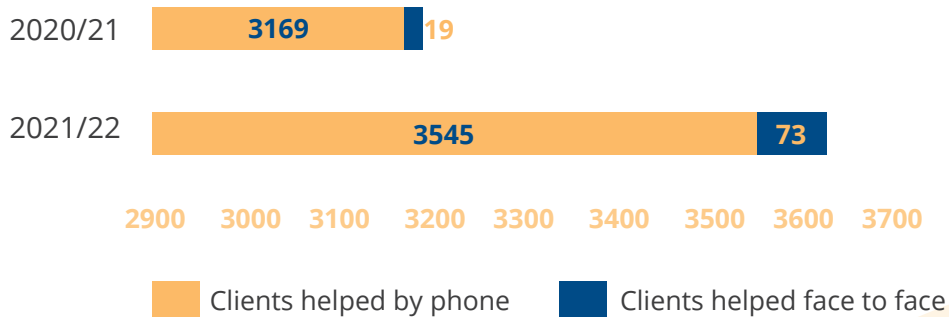
In total over the year we supported 10,252 clients with advice (general advice service) and specialist casework (projects). This represented a 31% increase in volume of work compared with 2020/21.

The majority of our clients' initial engagement with us was through the general advice service and last year saw our highest ever number of contacts where 7,152 clients accessed this service. Those that presented with multiple and complex advice needs were transferred into specialist casework following an initial advice appointment.

The general advice service is delivered by a team of paid and volunteer advisers. Our volunteer team advised 3,618 clients (50% of total clients helped by the general advice service) a remarkable achievement given the increased complexity of the clients' advice needs and circumstances.

## Objective 1 (cont.)

### Volunteer Advisers Contributions compared 2020/21 and 2021/22

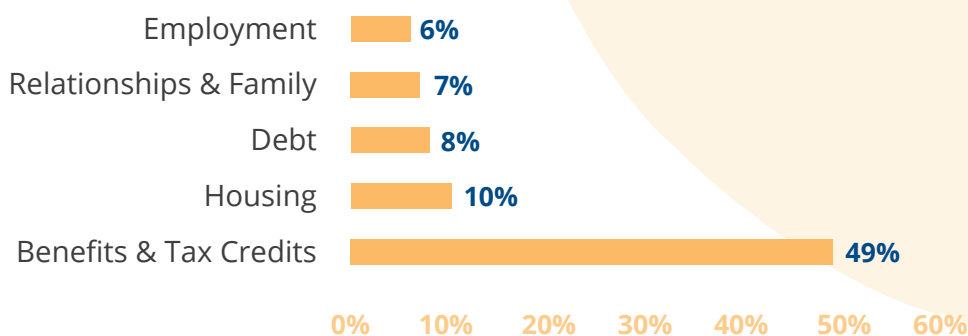


Most of our services were delivered by phone, however we were able to increase the number of face-to-face appointments available and saw about 6% of clients in person over the year. We expect to continue to expand our advice channels and increase client choice, but do not anticipate a return to pre-covid face-to-face drop-in as most clients prefer to access advice by phone or email telling us this is more convenient for them.

The advice needs presented by our clients continued to reflect the impact of the Covid-19 pandemic. Of most significance was the huge increase in demand for benefits advice (making and maintaining a claim) compared with 2020/21. There were a number of factors that drove the rise in demand and these included lengthy delays in processing claims, the resumption of benefit eligibility re-assessment (Personal Independence Payments) and the end of the Settled Status arrangements made for EU nationals continuing to live and work in the UK after Brexit.

In response we increased the number of advisers trained to offer follow-on help with benefits issues to ensure that we had the capacity to meet this need. The training for staff and volunteers included specialist sessions run by the Child Poverty Action Group (Personal Independence Payments Claims to Decisions) and Mental Health and Benefits.

### Main Issue on First Contact as a % of all Presenting Issues



## 2.

## Improve routes into face-to-face advice for clients whose health and support needs prevent them from using the phones or online channels

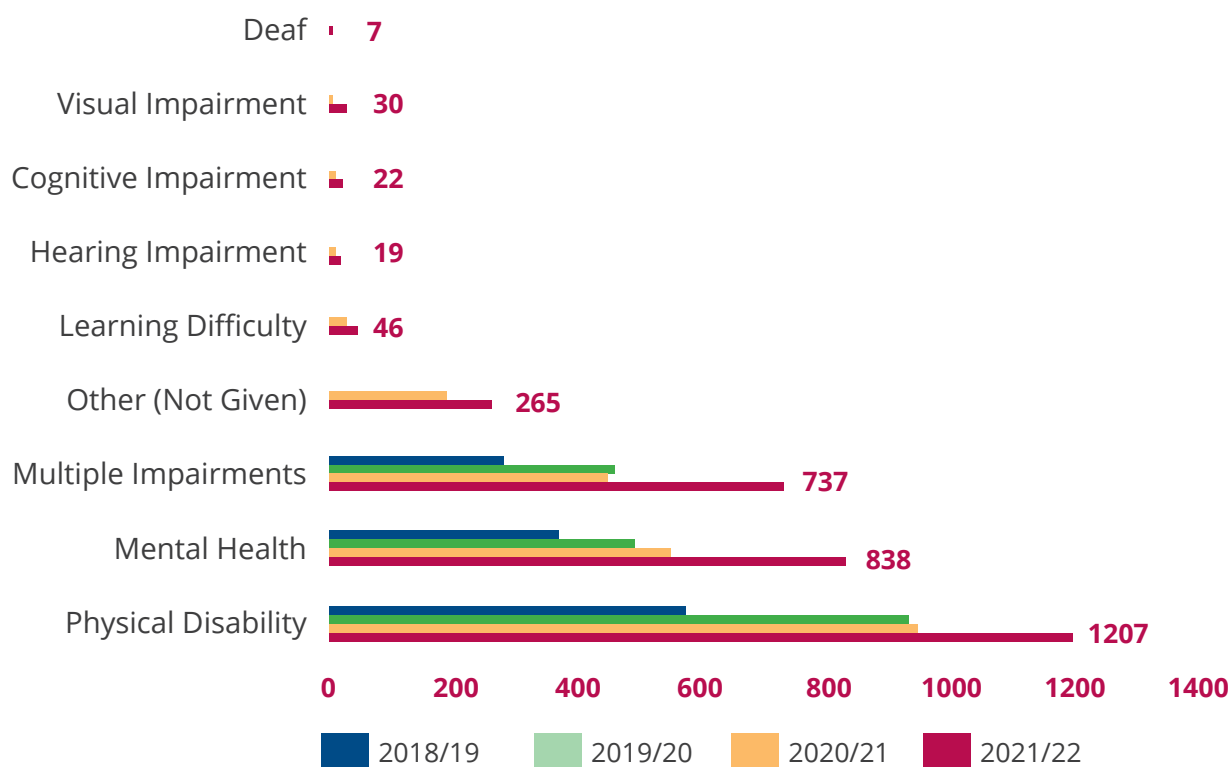
### ..... Working from our partners' premises and seeing clients by appointment.

We were very pleased to be able to return to work from a number of our partners' premises and began to see clients by appointment at the Westfield Community Centre in Yeovil, the Balsam Centre in Wincanton and Forefront in Chard. These plans will continue over 2022 and will include re-opening sessions in Crewkerne and Martock.

In response to feedback from our referral partners, we invested in a Somerset-wide agencies' referral portal during 2020. This is hosted on the Citizens Advice in Somerset Website and our own CASS site. The aim of the portal was to make it simpler for agencies' staff, so that they did not need to direct a referral to the nearest Citizens Advice (the portal does that work for them). Over the year we have made a number of modifications to the referral process. These have improved our efficiency with the referral portal now including provision for uploading clients' documents. The outcome of these changes has been that it is now easier for clients to be introduced to our service, provided with access to face-to-face advice appointments and we now offer a better, simpler process, for our referral partners.

"I contacted CASS for advice after the breakdown of my relationship. My adviser was extremely helpful, even called back the following day with more information. I felt supported practically and emotionally. It was daunting not knowing what to do but my adviser's information answered all the questions I hadn't realised I needed to ask"

## Health and Disability Profiles compared from 2018/19 to 2021/22



### 3.

**Expand the specialist services for clients who are most at risk of financial distress, crisis or enduring disadvantage**

#### ..... **Tackling complex advice issues and the underlying causes**

Our data from last year demonstrated that clients' monthly incomes fell during the year. This was especially so for households that had benefitted from the furlough scheme or the £20 a week Universal Credit uplift awarded during 2020. Both schemes ended in October 2021 and as a result we saw increased numbers of people seeking advice for rent arrears, affordable housing and debt.

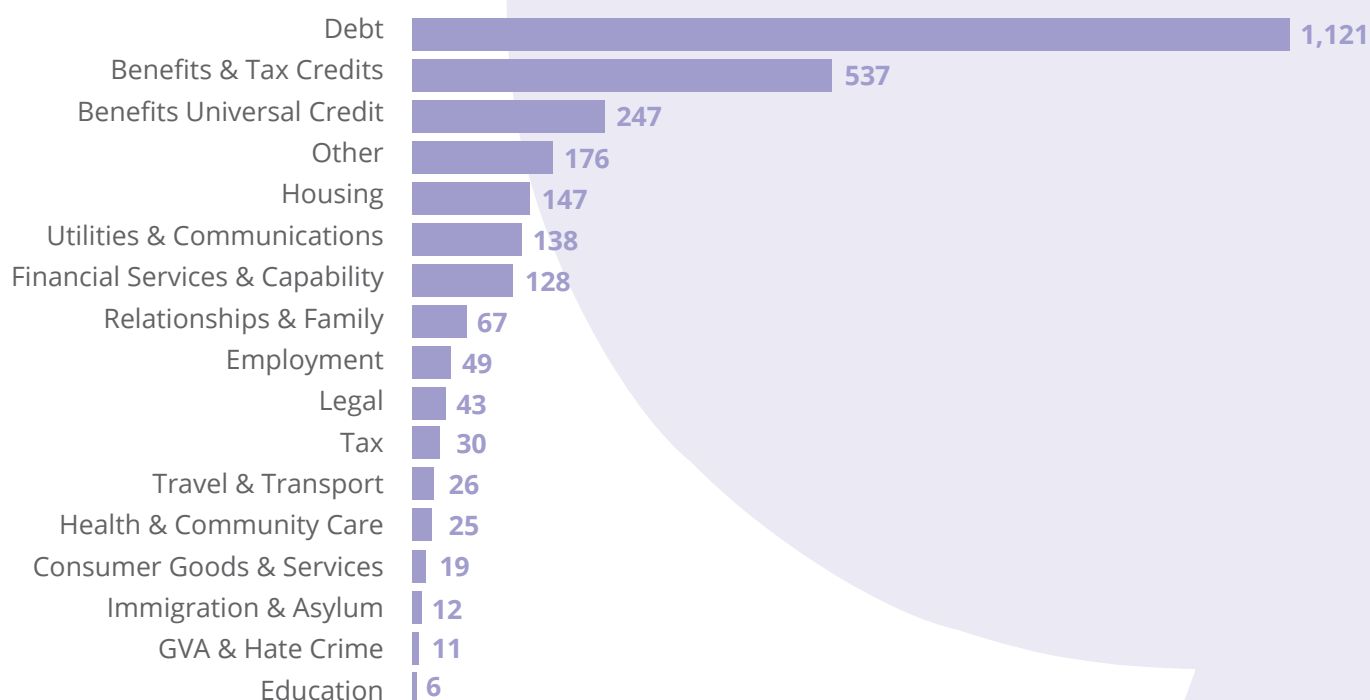
Over the winter months, issues in the energy markets (price cap and supplier closures) also increased the need for advice, and specifically money advice, and we expect this will continue throughout 2022.

#### **Talking Money, Debt Free South West – 662 clients helped**

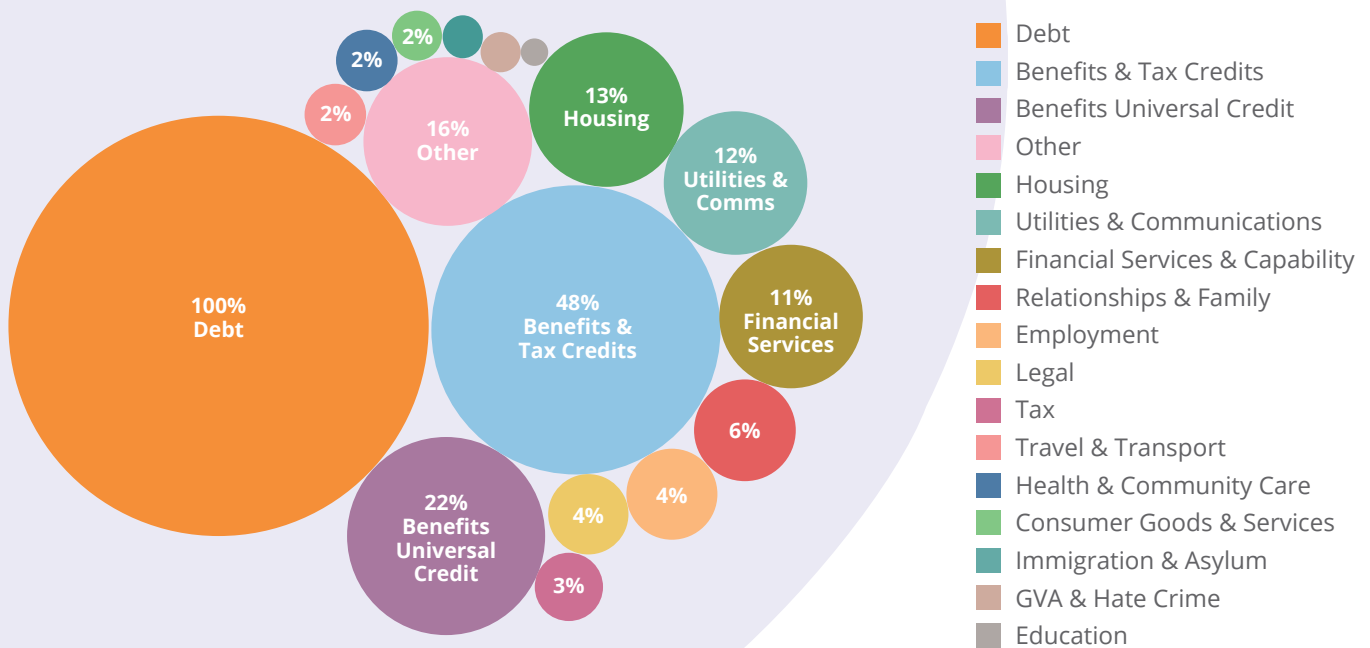
During 2020 we secured additional funding from Talking Money to recruit and host trainee debt caseworkers and welcomed three people into the scheme. All three trainees graduated last year and have been moved into permanent roles with one joining our money advice team and two joining our debt and mental health services. The overall benefit to the organisation has been to boost our capacity to provide debt casework including offering full resolution (Debt Relief Order).

Over the last year we provided specialist debt casework to 662 clients (increased by 69% compared with the previous year).

#### **Diagram of Secondary Advice Issues for our Debt Clients**



## Objective 3 (cont.)



£739,279 of client debt was managed and written off

£81,657 of client debt was managed within repayment schedules.

34 clients were supported to access the Mental Health Breathing Space, a scheme introduced in 2021 to take the pressure off people with debt issues while they are receiving crisis treatment.

### Help to Claim Universal Credit - 399 clients helped

This programme was a national scheme hosted by National Citizens Advice. We provided one full-time adviser who was available by phone and web chat to assist clients that needed help to make an initial claim. Although many clients found the claim process straightforward, this provision offered vital assistance for clients that found the digital process too complex to manage alone.

### Local Assistance Scheme and the Household Support Fund

Somerset County Council Local Assistance Scheme: We supported 253 individuals with access to food parcels and 95 clients with access to fuel vouchers or other emergency help (bedding, cooking equipment) through the Local Assistance Scheme. This is a Somerset County Council scheme for those experiencing financial hardship due to a crisis (benefits delayed or stopped, fleeing violence, made homeless, accidents etc)





## Objective 3 (cont.)

Household Support Fund: 2021 saw the introduction of a new government scheme, which aimed to provide short term financial assistance to households struggling with their essential costs (food, energy, water etc). We supported 1,628 South Somerset households distributing £414,511 among them.

### **Abri Fresh Start – 177 clients helped**

2021/22 saw a change in approach to Abri's funding for CASS with a focus on specific local communities. We secured funding for a Fresh Start programme in the Chard area. This was partially related to the level of need in the area and to the closure of Oscar Mayer, Chard's largest employer. This project not only enabled CASS to re-start a face-to-face offer in Chard, something that was very much needed after the pandemic, but also to offer full casework, not just advice. CASS worked with partners in Chard, in particular with the Forefront Centre and Lords Larder Food Bank, and started seeing clients face-to-face in May 2021. General advice and specialist debt casework were provided, by appointment, three days per week. The positive results of this project became apparent almost immediately, both in terms of the number of clients helped and the depth of the help provided. Clients were seen from Chard and the surrounding area, including the larger towns of Ilminster and, to a lesser extent, Crewkerne who's outreaches had yet to re-open. Abri and non-Abri tenants alike were seen and helped.

### **Assist Pathway – The Henry Smith Foundation – 105 clients helped**

This was the second year of the service which was designed to support the needs of clients living with severe mental ill health, in order to provide a blend of advice, coaching and peer support (Confidence Clubs) in order to address clients' problems and the underlying causes. The Pathway allows us to provide clients with the support they need to maintain engagement with their adviser as we work through what are often long-term and complex debt and money issues. Further assistance on confidence building and financial capability skills are provided through the coaching and peer support aspects of the programme.

Over the year the complexity of clients' cases increased and this meant that it took longer for the team to assist each client to achieve their goals and outcomes. One of the major successes from the Assist Pathway has been the refinement of our team- around-the-client approach where the Assist Pathway caseworker supports her clients to engage with the specialists in the money advice team – acting as an intermediary and advocate for her client. This model has meant that we've been able to support and reassure clients throughout their debt resolution and where appropriate secure a "mental health Breathing Space" application – giving us longer to resolve the client's issues.

### **Open Mental Health – Wider Determinants 299 clients helped (South Somerset)**

Open Mental Health is a Somerset alliance of voluntary organisations and the NHS that work together to support people living in the community who experience mild to moderate mental ill health. As the lead for the Wider Determinants of Health programme, we co-ordinate the contributions from the four other Citizens Advice offices in Somerset. Our wider determinants service has been designed so that our team are dispersed across the County but work seamlessly together to address the needs of clients who access Open Mental Health. Each local Citizens Advice hosts a specialist caseworker offering holistic advice and, where needed, ongoing casework. The service became more established during the 2021/22 year – having been launched in 2020

## Objective 3 (cont.)

– and as a result the number of clients introduced to the Wider Determinants team increased considerably. The South Somerset team supported 299 clients over the year.

One of the key objectives for Open Mental Health is the concept of “no wrong door” ensuring that clients are offered all the support they need regardless of the first agency they engage with. Over the year the number of introductions to the Wider Determinants team increased with 389 coming via Somerset Foundation Trust and 147 coming via Mindline and other Open Mental Health partners. £125,451 of benefits income was secured for clients supported by the South Somerset Wider Determinants team.

### Open Mental Health – Next Steps – 66 clients helped

During the year the Open Mental Health partnership received confirmation of continuation funding for a project that began with Winter Pressures funding. The Next Steps Service supports patients as they complete their recovery from acute mental ill health. Two part-time caseworkers from Citizens Advice attend the acute wards in Taunton and Yeovil on a weekly basis and work alongside recovery navigators to assist clients with outstanding or long-term problems.

66 clients were supported in the year and £38,895 of benefits income was secured for them as they moved out of hospital and back into independent living.

### Homelessness Reduction Support – SSDC – 143 clients helped

We have worked closely with the housing officers’ team at South Somerset District Council for many years. The 2017 Homelessness Reduction Action places duties on local authorities to prevent homelessness, reduce rough sleeping and to address specific needs of those at risk of homelessness.

SSDC funded a dedicated caseworker who provided in-depth support to clients at risk of homelessness in order to help them sustain their tenancies wherever possible. Other support included making applications to Homefinder, seeking alternative accommodation and providing advice on all presenting issues including debts.

31 clients referred via SSDC Housing Team

11 clients referred via other agencies (Social Services, MP, Village Agents)

87 clients presented directly to CASS

### Macmillan Cancer Support – 887 clients helped

The Citizens Advice South Somerset Macmillan Service offers advice, including specialist welfare benefits casework, and assistance with grants for people living with cancer and their families and carers.

The service has been running for many years and we have very established relationships with the cancer teams at the hospitals and at St Margaret’s hospice. Prior to the Covid pandemic clients were seen in person at different treatment centres across the District. Due to the health vulnerabilities of those receiving cancer treatments, many clients opted to use the telephone service for their initial

advice during the first year of the pandemic. As the Covid Pandemic rules were relaxed last year, the Macmillan Advice team were able to offer increased numbers of face-to-face appointments from their base at the Yeovil Foyer, and this was very well received by those clients who struggled with phone advice.

£2,424,007 of benefits income was secured for clients of this service.

4.

## Strengthen the sustainability of our organisation

### ..... Improvements to business and information technology systems

Over the last year we continued to progress with improvements to our business systems and use of technology. These included switching to MS365 accounts and beginning the necessary preparation ahead of our move to a cloud-based server in 2022. The biggest change for staff and volunteers during 2021 was our move to MS365 telephony. The advantage to the organisation stems from the versatility of the system allowing staff and volunteers to make and receive calls over the internet using their laptops, chrome books or PCs. As a result of this investment, it has become much easier for staff working remotely to host 3-way calls (bringing DWP into a call during a client's advice).

Alongside our system changes we were also very focused on our information security and were delighted to receive our Cyber Essentials Certificate of Assurance in September 2021.

Other developments included an overhaul of our website (appearance and function) in order to present a more welcoming site and to improve ease of use for clients and referral partners. The upgrades made proved invaluable later in the year as we were able to use the site as the first point of access for clients applying to the Household Support Fund.



## 5.

## Maintaining a culture of excellence and inclusivity investing in our people and supporting everyone

### ..... Supporting our staff, volunteers and trustees to thrive and excel

The high workload and the increased complexity of clients' issues can impact on our staff and volunteers' wellbeing. Fortunately our membership of the Open Mental Health Alliance meant that we were able to share best practice among partners and this led to our introduction of Wellness Action Plans and the offer of monthly clinical supervision for anyone on the team. Each year National Citizens Advice invite staff and volunteers to take part in an anonymous satisfaction survey. We were very reassured by the results as our team reported feeling valued, listened to, well equipped and trained. 95% of our staff and volunteers "would recommend working for CASS".

Alongside the emotional wellbeing programme, we were able to introduce a Hybrid Working policy allowing staff to split their working time between our offices and home. This was well received and staff quickly settled into their new routines.

Staff and volunteer training ran throughout the year and included a mixture of online learning and tutor led (in person) sessions. In addition to the ongoing training programme, we held the annual Away Day in person during November 2021. It had been several years since we'd been able to get together and for some staff and volunteers it was the first time they had met colleagues in person. The day was a huge success and we were very grateful to our external guest speakers and trainers:

- Angela McCormack – Building Personal Resilience
- Liz Simmons, Headway Somerset – understanding Acquired Brain Injury
- Michelle Crabbe, Law Stop – Housing Advice (challenging decisions)
- Niki, Tim and Martha, SARI and SWAN Advocacy – Hate Crime Awareness
- Claire, Mind in Somerset, How to handle conversations around suicide
- Jon Shoesmith, Citizens Advice Taunton – Young Persons Advice Service

### Best Workshop Attended



# Operations Report

..... Client Services Manager - Kim Watts



Once again, this year was dominated by the Covid Pandemic and moving in and out of lockdowns. This continued to impact services locally and nationwide with staff, volunteers and clients being cautious and adapting to a new way of accessing advice. We committed a considerable resource to the telephone advice service so that we were able to manage increased demand for advice by phone and in order to ensure that clients who used the service received full advice on first contact (no need for call backs) wherever possible. Those clients that required additional, follow-on advice or specialist casework were transferred into further help, much of which was also delivered by phone.

Our commitment to equity and inclusion informed our decisions on access to advice options for clients, and we extended our email advice service so that clients were able to access 24/7 and receive timely responses (full advice by email) or move into phone or in-person advice where needed.

There was a cautious but steady return to face-to-face advice by clients. The traditional drop-in service was closed at the beginning of the pandemic and, much to our surprise, most clients have managed the channel shift, using phone and email very successfully. We recognise that there will always be a need to offer face-to-face advice and we will continue to expand the number of in-person appointments available over 2022, including at outreach locations in Wincanton, Chard, Crewkerne and Martock.

2021/22 also saw the recommissioning of debt advice by MaPS (Money and Pension Service). The timing and service specification originally planned by the commissioners caused some concerns among the debt agencies and after a number of meetings MaPS decided to pause the re-commissioning to allow for further consultation. Despite the uncertainty about funding within the debt advice sector, we were pleased to have been able to keep our experienced team together and continued to offer a bespoke debt advice service to our clients throughout the year.

We saw a high demand for help with housing problems, homelessness and benefit appeals and thanks to the perseverance of our staff we achieved a great many successfully overturned decisions that ensured our clients received the income or housing they were entitled to. Being able to join an appeal via video link proved to be very helpful and enabled us to support clients where previously we were unable to help (due to the need to attend appeal hearings in person). Other common issues among clients included help to complete online applications. This is an increasing problem and a significant number of clients told us they felt embarrassed when faced with digital content that they did not understand and could not use.

On a personal note I was extremely honoured to receive an award from the High Sheriff of Somerset for services to the community. I feel very strongly that this reflects the great service and commitment that all of the staff and volunteers give to Citizens Advice South Somerset to ensure that our community receives the best possible advice at a time when they need it.



