

Winchester Citizens Advice Bureau

The Winchester Centre
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Open for face to face or telephone advice and information on any subject

AIM OF THE SERVICE

To ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available; or through an inability to express their needs effectively and equally to exercise a responsible influence on the development of social policies and services, both locally and nationally.

FOUR PRINCIPLES OF THE SERVICE:

Free Confidential Impartial Independent

SERVICES AVAILABLE - WINCHESTER CITIZENS ADVICE BUREAU

- Advice and information on any subject
- Telephone advice line
- Home-visiting service
- Debt counselling and supported debt management
- Representation at Employment Tribunals
- Representation at Social Security Appeal Tribunals
- County Court Representation and Advice Desk at possession hearings
- Free legal advice (via referral by CAB)
- Outreach to Winchester Prison
- Specialist Mental Health Benefits Adviser
(via Community Mental Health Team)
- Specialist Money Advice/Benefits Adviser
(Winchester Housing Association)

Chairman's Report

It has been an interesting experience resuming the role of Chairman of Winchester Citizens Advice Bureau (CAB) after a decade's absence. I expected changes but many have been substantial. The almost doubling of the number of enquiries over this period has resulted in a like increase in the number of advisers. The "new" premises at St George's Street are used to their capacity. Cases have increased in complexity. Computers have mushroomed. The standards required by the National Association of Citizens Advice Bureaux (NACAB) seem ever more demanding. The bureau receiving its Community Legal Service Quality Mark in Generalist Help on any subject and casework in Welfare Benefits and in Debt was a major step this year. What is essentially part of the voluntary sector is being judged against commercial criteria.

We are extremely fortunate in Winchester in having advisers who are well able to meet these challenges and volunteers who are prepared to commit their time and energies to becoming fully trained advisers. This is not to belittle the very substantial workload and responsibility taken by paid workers and in particular by Jenny Meadows as Bureau Manager and Mary Barnard as Deputy Manager. Their teamwork and commitment to the running of a successful Bureau is unstinting.

I must express my thanks to the Management Committee for its support of the Bureau. I hope I may be forgiven for singling out the Honorary Treasurer, Dick Rutter, for special mention. Ensuring that the Bureau keeps within its budget is no easy task and Dick Rutter has been a meticulous Treasurer. Future funding may well be less in real terms than that received in the year 2001/02 and a reduction in funding inevitably leads to a cut in services. The Committee is well aware that the bureau must aim to ensure that people do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them.

Those who are housebound and unable to come to the Bureau are seen as vulnerable. The Committee will endeavour to keep operational the home visiting service in line with Winchester City Council's strategic policies and priorities of "*-services which promote social inclusion -services for the elderly and -services which address issues of relative poverty, isolation and deprivation.*" Although it is noted that such a scheme is time consuming it must be supported with appropriate resources.

The Bureau remains grateful, as always, to Winchester City Council and other funders. I believe this report shows that the Bureau is using its resources wisely and effectively to meet a substantial need in the local community.

I cannot finish this report without mentioning Beth Taylor our past Chairman who received her Volunteer of the Year Award for Trustee members at the NACAB AGM in York in September 2001. Beth's work with Winchester CAB over the previous decade was rightly rewarded.

John Lunt, Chairman

Manager's Report - Jenny Meadows (Manager), Mary Barnard (Deputy)

No of enquiries per year now over 20,000

There are always two things that can be counted on in Citizens Advice Bureau work and they are that we never have a shortage of clients and that we are forever managing change. However, this year, we were fortunate to have a period of stability with regard to paid staff. Chris Janson moved from 10 hours Bureau Administration Officer to working 3 hours on administration with the Winchester Housing Association Money Advice Worker. We welcomed Liz Sladen to take on the 10 hours as Administration Officer (Finance). Liz continues as a volunteer both on the home visiting team and as a bureau adviser. Jean Horn, our Project worker celebrated 5 years of working with the bureau and Ian Tattersall celebrated 10 years.

Quality Mark - Community Legal Service The bureau was successful in passing its preliminary audit at General Help on all subjects and with casework in Welfare Benefits and in debt. This involved a lot of work and some changes in systems and procedures in the bureau to work within their criteria. This audit will be carried out on a yearly basis. In January 2003 our National Association will audit the bureau.

Here are some of the thank you notes we have received from clients:

"The most important thing is they (volunteer advisers) listen. They didn't talk down to me but with me, which helped my self-esteem, which was sinking. The home visit was excellent, making one more relaxed - it was such a relief knowing that the forms were filled in correctly. Thank you"

"I want to thank you and your colleagues for all the help you've given to me this year. It is very much appreciated. You offer an amazingly anxiety and worry removing service. Thank you."

"If anyone ever says to me that they have problems I always say, "go to CAB they are brilliant."

"I'll repeat it - you are wonderful! This effort on your part is a tremendous help to me."

"She (volunteer) listened and drafted a super letter from me to send to my consultant. I have now received his written apology; she is a wonderful ambassador for the Citizens Advice Bureau."

"...one of your advisers, who I must praise greatly. She showed me great respect and understanding. Subsequently thanks to your wonderful efforts the dispute is now solved. You really do provide a wonderful service."

"I would like to extend my very particular gratitude to your adviser who has guided me through all this to a successful outcome. It is only by her dogged persistence, insistence, skill and much patience that the agency eventually saw sense and relented. This process took many months during which time she always greeted me with a smile and had words of encouragement when I was often feeling down."

Training As part of the new training competence programme, Liz Sladen, became the NACAB South Region's first trainee adviser to gain her *Certificate in Generalist Advice Work*. Also Penny Diver, an ex CAB Manager joined us after having home care responsibilities and was the first volunteer in the NACAB South Region to have been assessed for competence using *Accreditation of Prior Learning (APEL)*. The Bureau recruited its first *Millennium Volunteer* - Alex Gladstone. Alex had first come to the bureau as a Student Placement (see below) and after completing her degree started training with us. Three trainees successfully went on to become trainee advisers and a further 7 trainees started. We have found, like most bureaux, the new national *competence programme* for training volunteer advisers to be a challenge but trainees and staff both paid and volunteer have identified that although it involves volunteers in extra commitment during their 9 months training period it does make for better prepared advisers who are more quickly able to be part of the advising team. I have to thank Ann Gilbertson our Training Officer and both Mary my Deputy and Jean our Project worker for all being part of the tutor team.

Volunteers The bureau lost 11 volunteers (3 went on to paid work) and gained 8. Two advisers joined us from other bureaux. Margaret Gunn, our first wheelchair user volunteer switched from being a trainee adviser to helping us update our Local Information. Tony Keates, our longest serving male volunteer (17 years) retired from advising but remains as a volunteer, helping us with social policy work. Our staff list is on the back page of this report.

Work Experience We had two requests for opportunities to undertake work experience with the bureau for one week each. One has since been accepted for training with Swansea CAB.

Funding In March 2001 funding for our Rural Outreach Advice Direct (ROAD) project finished but the bureau was able to gain enough funds from various sources including Mid Hants Primary Care Trust, Hampshire County Council Grants to Voluntary Organisations and Winchester City Council to continue with a home-visiting service.

Fund-raising The bureau undertook its own fundraising this year and managed two car boot sales, the proceeds of which purchased air conditioning units for the General Office. This has made a considerable difference to the welfare of the volunteers. One volunteer had left the bureau due to the extreme conditions in the CAB offices during the summer months.

Charitable funds for clients The Winchester district does not have access to many charitable funds and each year we are successful in getting small amounts from Winchester Welfare Charities for client need and we would like to thank them for their continued support. We continue to hold a small amount of money from Winchester Rotary club to allow us to make small contributions to client need when all other avenues are exhausted.

Thursday Evening and Saturday morning opening

We were very disappointed that due to shortage of funding to had to cease our Thursday evening and Saturday morning opening in April 2002. We started this extension of hours in January 2001. In the 12-month period of this report we helped 351 new clients with 450 enquiries. However, the Management Committee felt that providing a home-visiting service reached more vulnerable clients and this development, although successful, had to cease.

County Court duty desk

The development of fortnightly possession hearing days is now a well-established strand of bureau work. Nine advisers have attained the skilled level of housing and debt expertise needed to staff the desk. Twenty-two court desk sessions were staffed. 18 clients were advised but not represented, 62 were advised and represented at the hearing. 88% of those attending the hearing were helped at the duty desk and they all retained their home and avoided the very real threat of homelessness.

Computer networking

This has proved invaluable to the smooth running of the bureau and paid and volunteer staff alike are making excellent use of the Electronic Information System, Local Information and Benefits Calculation software.

Winchester Prison Our weekly visits to Winchester Prison continue to be welcomed by prison residents both male and female. Four advisers helped with 212 enquiries (up 65%).

Representation Michael Stevens, now joined by Kate Gedye and David Ross, continue to be successful at Social Security Appeal Tribunals and Disability Appeal Tribunals. One successful tribunal meant an award of £2,700 in back benefit.

Ann Burr has successfully negotiated successful outcomes for clients before they had to go to Employment Tribunal in one case at the door of the tribunal when an award in excess of £5,000 was agreed.

Client Satisfaction survey (This was carried out in June 2001)

- 229 personal callers completed a form. 83% of personal callers were highly satisfied
- 85 telephone contacts completed a form. 89% of telephone callers were highly satisfied with the service
- 51% of personal callers waited less than 10 minutes, 86% waited less than 30 minutes. Only 2% (5 clients) waited over 1 hour. 95% considered the wait acceptable
- 47% of telephone callers were answered immediately, 89% were answered in less than 30 minutes. 87% considered the wait acceptable
- 29% of telephone callers would have a problem getting into the bureau
- 63% of personal callers did not know about the Thursday/Saturday opening. 47% overall would find it more convenient
- 79% of telephone callers did not know about the extended service. 64% overall would find it more convenient

Publicity

We have continued our monthly Advice Column in the Newsextra, which is proving worthwhile. Mary has given a number of radio interviews on Win FM. We have given talks to various groups and been involved in the King Alfred's Roadshow. We held another Open Day on 4 October 2001 and our links with other agencies were strengthened and volunteers attracted to apply for training. For 3 weeks a display regarding the bureau services was in Steel's window at Chesil Street.

Premises Our interview rooms continue to be used by Olive Branch Christian Counselling in the evenings to make full use of our facilities. Carr Comm (special needs housing) and the Child Support Service have also used them as neutral ground for interviews. The remainder of the bureau was decorated this year as part of our lease agreement.

Community Legal Service Partnership A Handbook has been produced indicating legal services available in the Winchester District. It identified that the CABx are the only money advice outlets in the area and that we do most of the advice and support on welfare benefits.

Neighbourhood Mediation and Credit Union. The Manager continues to be active on these steering groups to try and get these projects off the ground in Winchester.

Best Value The Manager has been an active member as the Challenger on the Housing Policy & Strategy Division of Winchester City Council Housing Department Best Value team. A piece of work involving Communication has been undertaken on their behalf. They agreed to fund this and the Deputy Manager back filled the time spent by the Manager with some increased paid hours.

Dignity at work Policy and Health and Safety Policies were adopted as bureau policy.

This year saw the first home visit undertaken to a client with a hearing impairment, which meant the use of a British Sign Language interpreter.

Bureau Case Work - ie files that need repetitive handling

The number of our casework clients has grown considerably during the last few years. Anyone having sight of our filing cabinets will see enormous numbers of folders encasing case-work for all sorts of subjects - debt work, home visits, mental health benefits, Winchester Housing Association tenant referrals, Social Security Tribunals, Employment Tribunals etc. A spot check for this report showed nearly 200 ongoing files being worked on during the last month. Every adviser handles at least 2 debt files and our home visiting volunteers would probably be handling 3 or 4 ongoing cases each week.

Case Study: Kate Gedye, one of our volunteers has been helping a client for 11 months on their case. This has meant 11 home visits, 39 letters and 36 telephone calls.

Client aged 70, severely disabled and virtually bedridden. Social Services were sending in carers twice a day, seven days a week. Client had been in receipt of both Care and Mobility Components of Disability Living Allowance for a number of years. After an assessment by a Benefits Agency visiting doctor our clients Care Component was withdrawn completely (at the time worth £53.55 per week). When the client was referred to the CAB, the client was out of time for an appeal. A new claim was made together with a request for a late appeal. A considerable amount of time was spent writing and negotiating with the Benefits Agency and visiting the client at home to obtain a full picture of the home situation.

Eventually after the intervention, at our request, of the client's Member of Parliament, Mark Oaten, our client was granted Middle Rate Care Component from summer 2001. Leave to appeal was granted on the decision not to pay the Care Component for the previous 11 months. Kate represented our client at a Social Security Appeal Tribunal in November 2001. Arrangements had to be made for the client to travel by Red Cross ambulance to Southampton to attend the Tribunal as he could not use any other form of transport. The appeal was successful and the client was granted High Rate Care Component. This meant a back payment for the client of £2,700. Further letters to the Benefits Agency resulted in High Rate Care Component being granted for an indefinite period and arrears being paid. Our client's weekly income was increased considerably - currently by £56.25 per week.

Manager note: Our client tells us he would not have had the good health, energy, or understanding to make an appeal and would probably have given up at the first hurdle. Kate like other volunteers in the bureau had the commitment, and made the time and effort to get the right outcome for the client. The bureau and its clients are fortunate to have volunteers like Kate in our team.

HOME VISITING SERVICE -

Jane Robinson -Home-Visiting Service Co-ordinator (20 hours per week)

The Home Visiting team of 6 volunteer advisers has assisted clients with 2,400 enquiries either in their home, in hospital or residential care homes. 70% of our clients are over 65 years and the majority of enquiries relate to social security benefits. During 2001/02 we have enabled clients to make 85 claims for disability benefit, (each taking 2 to 3 hours to complete) and we have been made aware of awards for Disability Living Allowance or Attendance Allowance totalling £120,000. Three volunteer advisers have successfully represented clients at Disability Tribunals, enabling them to appeal against unjust decisions. Referrals come directly from clients themselves, their friends or family members, or via statutory and voluntary agencies. By listening, ensuring that clients maximise their income and providing information and advice about care and support available in the community, the Home Visiting Service can greatly enhance the quality of life of those unable to visit the Bureau through lack of suitable transport, ill health or disability.

Despite the success of our project, it has proved to be very difficult to obtain continued funding for the Home Visiting Service. Whilst statutory resources are being concentrated on those with the most acute home needs, many vulnerable people are not receiving the care and support they need to enable them to continue living in the community.

Case Study 1 Elderly clients, parents and carers of a daughter in her 40s with severe learning difficulties since birth, were having difficulty affording her care and mobility needs. They were totally unaware that they had been eligible for welfare benefits for many years. A successful award of Disability Living Allowance, in addition to means tested benefits, increased the family income by over £300 per month, thus enhancing the health and well being of them all.

Case Study 2 A self-employed father of 3 children aged under 11, suffered a serious accident at work, resulting in major orthopaedic surgery. Further surgery is necessary and he is unlikely to be able to work again for at least two years. We were able to visit him in hospital and at home to give advice regarding maximisation of income, housing, employment, legal and disability issues, as well as providing details of support services available in the community for our client and his wife, suddenly his main carer.

TRAINING -

Ann Gilbertson - Training Officer (15 hours)

This has been a busy year on the training front for advisers and new volunteers. The training programme for new volunteers requires a high level of commitment. It consists of 3 stages: the first consisting of approximately 20 weeks where the trainees read training packs, carry out exercises, observe interviews and attend a weekly tutorial. This culminates in the second stage of a six-day taught course run by our National Association of Citizens Advice Bureau (NACAB). Once 3 assessed interviews have satisfactorily taken place the volunteers become trainee advisers and start the third stage. This consists of interviewing clients with support and collating evidence for a Record of Learning, which details the specific competences they need to meet.

This year two volunteers; Liz Sladen and Sheila Norman have met this rigorous programme and have received their Certificate in Generalist Advice Work. It has obviously entailed a lot of hard work and perseverance on their part and they are to be congratulated on their achievement.

Three new volunteers have joined the scheme and are now collating evidence for their Records of Learning.

All generalist advisers need to keep up to date with developments in all areas of advice. To assist this we have 10 Workers Meetings each year, which a variety of speakers have attended to raise awareness in many different areas. These have included National Association for the Care and Resettlement of Offenders, the work of a Winchester City Council Housing Officer, NACAB's Information System to name a few.

Two days of training for experienced generalist advisers was provided by our second-tier consultancy in Housing (National Homelessness Advice Service) on the possession process. Paid staff and volunteers also attended courses on a variety of subjects including: Handling difficult telephone calls; Mental Health Awareness; Social Policy and Welfare Benefits training. We have carried on with our monthly in-house training sessions which have included Update on Welfare Benefits; PG debt (computer debt management software) and completing DLA and AA forms.

It is important to keep the balance between offering a variety of courses for our generalist advisers and training new volunteers. Although NACAB concentrates its resources on the basic training programme we have found ways through using our experienced volunteers and paid workers to maintain a reasonably varied training programme for all advisers.

Social Policy Report –

Ann Gilbertson - Training Officer with responsibility for Social Policy

What is Social Policy work? Social Policy is the set of rules and principles that shape the services and benefits that people rely on. It has a major influence on the lives of our clients. Some policies will be made at a national level, for example, social security benefits, and others will be national but administered at a local level, for example, education. The equal aim of the CAB service is to exercise a responsible influence on the development of social policies and services both locally and nationally.

Why do we do Social Policy work? Addressing client's individual problems will help that client, however, in the long term it is vital that we address the root cause of a problem and endeavour to persuade the policy makers to make changes. The vital tool on which all social policy work depends is the **Bureau Evidence Form**. The majority of the submissions and reports prepared by the National Association of Citizens Advice Bureaux (NACAB) which appear in evidence reports and briefings to Parliamentary Committees will include evidence from individual bureaux initially produced on these forms.

We were pleased to be identified as being in the top quartile of bureaux in the numbers of evidence forms submitted. During the 12 months in 2001 Winchester Bureau sent 103 Bureau Evidence Forms identifying the following categories:

Benefits	36
Consumer/debt	15
Housing	14
Disability Living Allowance	8
Employment	8
Prisoner	4
Education	3
Medical	2
Other	13

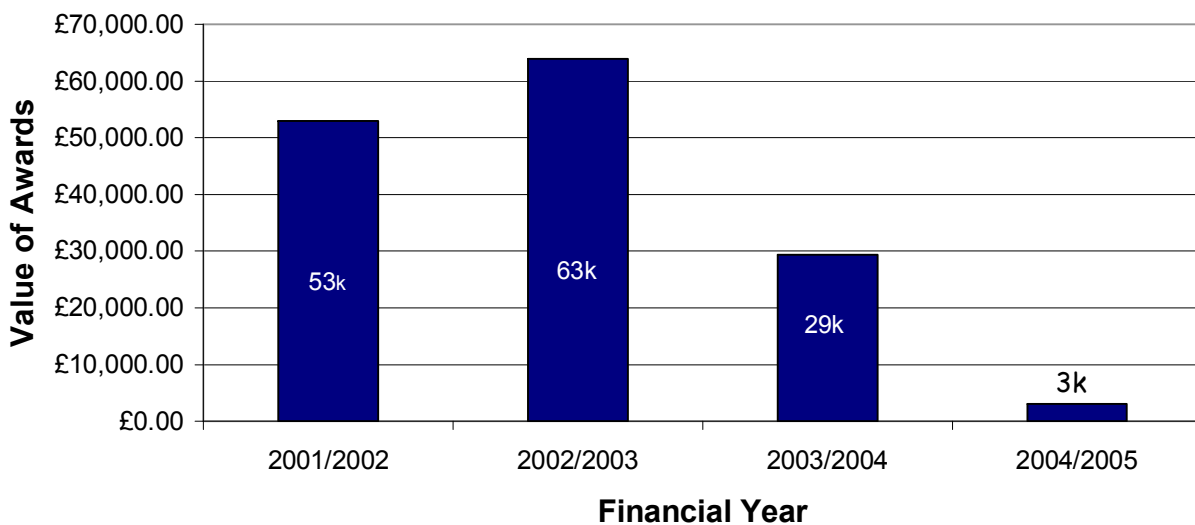
The home visiting team in particular has identified social policy issues in relation to Disability Living Allowance claims. These have concerned the Visiting Doctor's reports, which have resulted in some clients with multiple disabilities having claims turned down despite having very specific and continuing care needs. Although we have been successful with these claims at a Disability Appeal Tribunal the process has caused clients great anxiety and exacerbates an already difficult situation for them - which appears to be due to an apparent lack of awareness/training on the part of Visiting Doctors.

Mental Health Benefits Adviser – Jean Horn (20 hours per week)

This was an extremely busy year during which Jean saw 177 different clients. Clients are seen by appointment at the bureau, at their home, at Melbury Lodge Psychiatric Hospital, at the Connaught House Day Hospital or at a venue of their choice. About 77% of these clients wanted help either with claiming Disability Living Allowance (DLA) or with problems arising over payment of the benefit. The adviser completed 111 DLA forms. So far we have only been informed of the outcome of 41 claims but the amount awarded in respect of those is £61,000.

Awards are made for different periods of time. The value of all awards made this year is shown below. This chart also reflects the projected financial benefits to the clients depending on the length of the awards.

Mental Health Clients - Value of Awards 2001/2



Case study 1 - A client was admitted to Melbury Lodge Psychiatric Hospital following a suicide attempt. The psychiatrist referred him to the adviser when she discovered that he had made the attempt on his life because of debt. The adviser was able to help with debt counselling.

Case study 2 - A client with mental health problems was moving to the Winchester area to be near his two sons. The CAB in his hometown had helped him to complete the forms to claim removal expenses and a Community Care Grant. However no money had been received. Upon contacting the Benefits Agency the Advisor discovered that the claim had been transferred to Winchester but not acted upon. A few days later the client received a cheque for £770.

Winchester Housing Association -

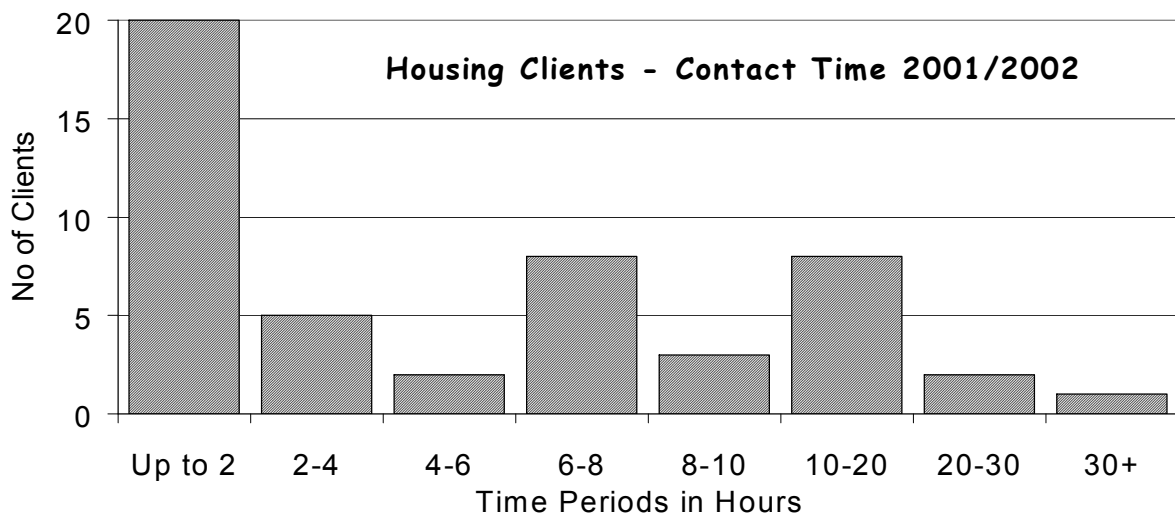
Money Advice Worker Jean Horn (10 hours per week)

Administration Officer Chris Janson (3 hours per week)

Winchester Housing Association refers clients who have Housing Benefit problems and/or face eviction.

During the past year there have been 25 new referrals and Jean continues to see 25 clients who were referred in past years. Most cases are complex involving several issues. Typically, Jean would need to follow up gaps in Housing Benefit claims and ascertain whether alleged overpayments of Housing Benefit can be challenged. Many clients will need to be represented at County Court at both possession and eviction hearings. All are given a welfare benefit check to make sure they are getting all the benefits to which they are entitled. Usually there is also debt counselling involved. In recognition of the amount of work involved with each client, the Housing Association agreed to fund 3 hours per week help from an administration worker.

The chart below shows the amount of time spent with each client.



Case study 1 - A young client, who had until recently been in care, was living in a hostel. There were problems over staffing and there was no one to make sure that she took the evidence required to the Benefits office and her Housing Benefit claim became void. Jean was able to help with a letter to the Housing Benefit department and £1889.30 in backdated Housing Benefit was achieved.

Case study 2 - A single parent was having deductions made from her Housing Benefit because her 18 year-old son was classed as a non-dependent, ie no longer part of the family unit. The Housing Benefit department assumed he was working and, as they had not received any evidence to the contrary, made a deduction at the highest rate. The whole family faced eviction because of rent arrears. The son was, however, suffering from depression and was unable to go out of the house. The adviser was able to assist in getting the non-dependant deduction removed and the arrears of benefit paid.



THE BUREAU TEAM

Paid Staff

Jenny Meadows Bureau Manager, 37 hours
 Mary Barnard Deputy Bureau Manager, 20 hours, + 2 hours Mental Health Project
 + 4 hours Acting Bureau Manager
 Ann Gilbertson Training Officer, 15 hours
 Jean Horn Mental Health Benefits Adviser (Social Services), 20 hours
 Money and Benefits Adviser (WHA), 10 hours
 Jane Robinson Home Visiting Service Co-ordinator, 20 hours
 Ian Tattersall Administration Officer, 9 hours
 Liz Sladen Administration Officer (Finance) 10 hours from September 2001
 Chris Janson Administration Officer (Finance) 10 hours until September 2001
 /3 hours for WHA Project from March 2001

VOLUNTEER ADVICE WORKERS (joined 2001/02* left 2001/02**)

John Ball	Bridget Hickey	David Ross
Prue Barlow**	Lorraine Howell	Jane Rutter
Andrew Beadle	Lynette Joly	Vicky Rutter**
Toni Booth	Tony Keates**	Liz Sladen
Fiona Brett	Mike Knight	Tricia Spink
Patsy Brough	Alison Locke**	Michael Stevens
Trish Brownlow	Eileen Lord	Jenny Streat
Ann Burr	John MacAuley	Karen Trippier**
Denise Cox	Annabel Meade	Catherine Upton**
Penny Diver	Harry Mowat	Merial Walton
Gay Finn-Kelcey	Shirley Nicoll	Pat Ward**
Kate Gedye	Sheila Norman	Alan Whetman
Dave Hall	Belinda Padilha	Louise Williams**
John Harvey	Francoise Renwick	Val Wilson
		Marian Witcomb

TRAINEE VOLUNTARY GENERALIST ADVISERS

John Clegg	Deborah Hobbins	Liz Pauls*
Alex Gladstone*	Robert Johnston*/**	Jon Tate**
Margaret Heffer	Margaret Gunn**	Carla White*
Joan Hewitt*/**	Gay Orr*	

VOLUNTEER ADMINISTRATION SUPPORT

Angela Brett*	Chris Janson**	Audrey Mould
Jane Farr	Tony Keates*	Pat Shelton**
Jean Griffiths	Gillian Hammill	Linda Taft**
Margaret Gunn*	Nancy Hanton	Jon Tate**
		Lynne Vincent*