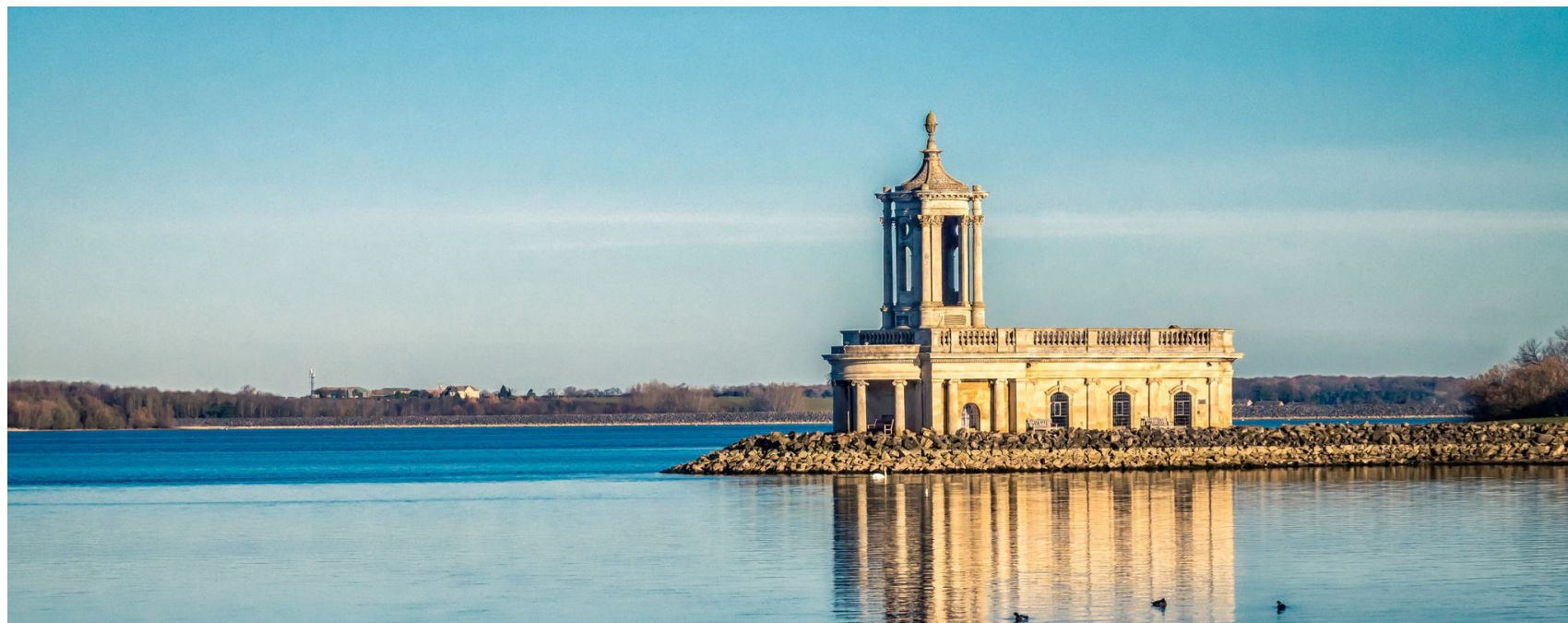


Citizens Advice Rutland

ADVICE FOR EVERYONE



Annual Review 2018

**Free, confidential advice.
Whoever you are.**

**We help people find a way
forward with their problems
and campaign on big issues
when their voices need to be
heard.**

**We value diversity, champion
equality and challenge
discrimination and harassment.**

We're here for everyone.

**We're working with you to
improve your wellbeing and the
wellbeing of the community.**



Next year Citizens Advice Rutland will mark 45 years since we opened our doors to provide information and advice to Rutland citizens. On a budget of around £3,000 and working with a group of expert local volunteers, the organisation set out to deliver a high quality service that would make a positive impact on the people of the county, built on

principles of independence, confidentiality and impartiality.

Budgets have changed but the organisation has stayed true to those founding values: friend and champion on the high street, delivering information and advice with professionalism, skill and care.

Over all the years of changing lives in Rutland, there will have been few that will have been as challenging for us as 2017/18: reduced funding, new service provision, personnel changes, increased compliance pressures for all charities, technological changes affecting the way we access advice and information and, perhaps most significantly, increased and more complex problems for our clients.

It is more remarkable then that over the last year Citizens Advice Rutland has continued to help a similar number of clients, has overseen the development and management of the new

Rutland Community Wellbeing Service, has started a Stop Smoking service, and has begun to develop a volunteering provision as well as providing support for the community and voluntary sector in the county.

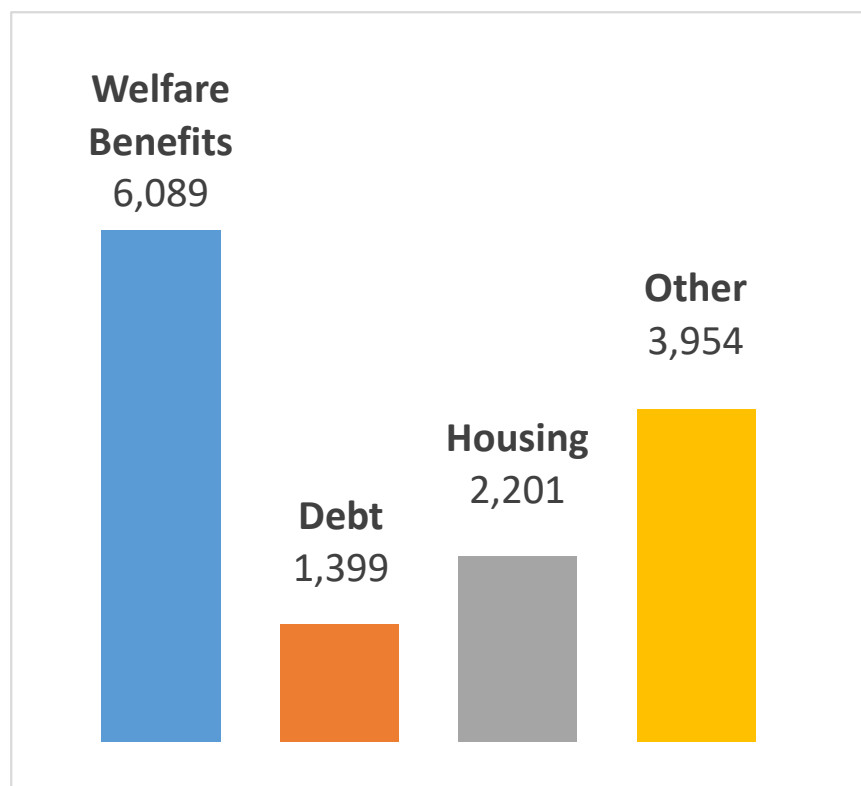
This was achieved whilst maintaining a relentless focus on ensuring that all our services are delivered to the highest quality, under the most searching scrutiny, and with the greatest care and support for the needs of our clients, the people of Rutland. This attention is reflected by extraordinarily high levels of satisfaction from clients, great commentary from partners, praise from Citizens Advice colleagues, and in the re-awarding of the Advice Quality Standard and the Money Advice Service standard in 2017/18.

The current year and beyond will undoubtedly bring increased challenge and pressure on service provision and we need to ensure that Citizens Advice Rutland and the Rutland Community Wellbeing Service are able to contribute to the ambition that Rutland is the happiest county for all its residents. We will of course work to remain lean, purposeful, innovative, agile and relevant to all stakeholders. But most importantly, as with our colleagues 45 years ago, we will endeavour to achieve that through a sustained focus on our principles, and the provision

of the highest quality and most effective and accessible advice and information.

A handwritten signature in black ink, appearing to read 'Simon Mutsaars'.

Simon Mutsaars, Chief Executive



2,687 clients seen - **13,643** problems dealt with in 2017-18



100% were satisfied or very satisfied with the service they received



100% said that the advice had made some difference or a lot of difference to their ability to help themselves



100% said that the advice had made some difference or a lot of difference to their health and wellbeing



100% said they would use the service again



100% would recommend Citizens Advice Rutland to others



Citizens Advice Rutland gained just under **£1 million** for clients and approximately a further **£1 million** for its 'For Rutland' clients

Quality advice and information that changes lives



During 2017/18 Citizens Advice Rutland saw 2,687 clients with a total of 13,643 issues, gaining just under £1m for clients and a further £1m specifically for clients with long term health conditions.

A wide range of issues were covered but Welfare, Housing and Debt problems were the main areas of advice. For the most part, advice was provided face to face and by telephone, but also by e-mail. Additionally, we are aware that there were thousands of hits on the national Citizens Advice website from people in Rutland looking for some self-help support. The quality of the service was externally and independently confirmed through the renewed award of the Advice Quality Standard, but also through routinely excellent scores under the national Citizens Advice audit and assessments of the quality of advice, client feedback, staff and volunteer satisfaction, leadership and financial performance.

As significant as all of these commentaries have been, it's the responses of our clients to our annual survey that provides the most authentic feedback on quality and performance.

It's the only place to give unbiased information

Wonderful service provided by all staff every time

Very welcoming and friendly

Very happy with the service

I am so very grateful and impressed by the care and attention

Very helpful and informative

Case Study



The client, who is 26, has suffered with mental health problems for the majority of her adult life. She came to Citizens Advice Rutland with multiple debt issues including Council Tax arrears.

At the initial interview we discovered that the client had very little money: her disability benefits had stopped months before as she had not renewed her benefit claim. She said that she had huge difficulties with dealing with anything.

The adviser dealt with the emergency of the Council Tax arrears by agreeing with the Council that recovery (court) action would cease until our money adviser could produce a full financial statement. During this interview the client revealed that she was at risk of losing her home as her landlord had accused her of anti-social behaviour against one of her neighbours.

It transpired that the client was having difficulty with her neighbours' children - the client stated that the children were noisy, and due to her mental health problems she had on more than one occasion shouted at them.

Our housing specialist negotiated with the client's landlord who arranged mediation, and the problem was resolved by all parties. The client is no longer threatened with any legal possession action and there have been no further incidents. The neighbours actually said that they had no idea of what had been happening and are now much more sympathetic to the client's circumstances.

We assisted with a new disability benefit claim to get benefit back in payment and then full money advice resulted in obtaining a Debt Relief Order (DRO) in order to get her debts written off. The client says that now that her debts have been written off "a heavy weight has been lifted and I feel a lot better about my life".

The annual financial gain for this client was £22,900 (£15,500 debt write off and £7,400 benefit gain). The cost of homelessness (particularly rough sleeping) to the public purse has been estimated by the housing charity Crisis as approximately £20,000 per annum.

Committed to collaboration

The modern operating environment places increased emphasis on partnership and integration, driven by increased complexity, financial stress and also by common sense. The need to avoid service duplication, to secure delivery efficiencies and the ability to provide seamless, holistic services to clients are all key considerations in the planning of service provision.

Citizens Advice has always worked with other organisations to provide clients with the best and most appropriate support and advice. 2017/18 saw a significant up-scaling of that approach.



The Rutland Community Wellbeing Service came into existence in April 2017. In its first year the service took over 4,000 referrals for advice, information

and support across a range of wellbeing services – financial, emotional, housing and homelessness, dementia, healthy lifestyles, sensory impairment, volunteering, employment and skills, and voluntary and community sector support. The Rutland Community Wellbeing Service has enabled us to ensure that clients need tell their story only once before getting to the package of advice, information and support they need.

The service is delivered by the Rutland Access Partnership, led by Citizens Advice Rutland but also involving The Bridge (East Midlands) and Spire Homes, with additional delivery support and expertise from Age UK Leicester Shire & Rutland and Vista.

Citizens Advice Rutland has developed, strengthened and evolved its links with a range of organisations including the Fire Service, Police, Mental Health Matters, Turning Point and the Rutland Food Bank, as well as looking to develop new collaborations that aim to improve quality of life for people.

Citizens Advice Rutland is also a member of a number of local multi-agency partnerships including the Local Strategic Partnership, Childrens Trust Board, Health & Wellbeing Board, and Safer Rutland Partnership.

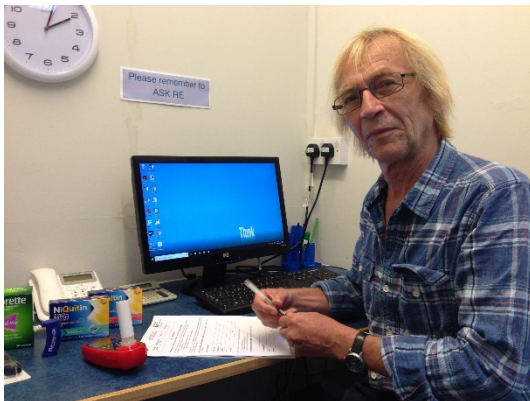
"I am delighted that the Rutland Community Wellbeing Service has had such a positive impact for Rutland residents. It has helped to change people's lives for the better. Not only is it a more effective use of Council resources, but more importantly we know that people get added benefit from accessing a range of services from one place."

Cllr Alan Walters, Portfolio Holder for Adult Social Care and Health at Rutland County Council

Stop Smoking Rutland

The Stop Smoking Rutland program has been specifically designed to identify individual needs and to help clients understand and work around the triggers that lead them to smoke. The program provides a free, non-judgmental support and advice service, that helps smokers to review all the medical and non-medical options available and to work with the one best suited to them.

Studies show that you're up to four times more likely to quit successfully if you use a combination of stop smoking therapy and specialist help and support from your local Stop Smoking service. Our trained Stop Smoking adviser helps to determine a quit date and offers a breath test, which shows the level of carbon monoxide in the smoker's body.



The adviser talks through the available NHS-endorsed stop smoking treatments, and can provide nicotine replacement products - including patches, gum, lozenges, inhalators and mouth

and nasal sprays, as well as referrals to local GPs for stop smoking tablets. Ongoing

support face-to-face or by phone is offered for the first 12 weeks.

Based at the Citizens Advice office in Oakham, our expert Stop Smoking adviser saw 87 Rutland residents during the service's first year, helping over half of those to quit in 4 weeks.

"In my first week I didn't buy 5 packs of cigarettes at £8 each. With that £40 I bought a microwave oven I'd seen in the supermarket - what an incentive to give up!"

Community and Voluntary Sector Support

As part of our Rutland Community Wellbeing Service responsibilities, 2017/18 saw Citizens Advice Rutland start to deliver services to support local community groups and voluntary sector organisations, to develop community capacity and support volunteering across the County.

The team has worked to promote volunteering and to broker volunteer opportunities with local people and social sector organisations. We have also developed a number of links with community groups during the year, and sat on a number of strategic partnerships and action groups. The Wellbeing service website (www.rutlandwellbeing.org.uk) was created, with information about funding and resources for the community and voluntary sector. We worked to promote funding opportunities, including hosting a seminar on the LEADER European funding opportunities: this has subsequently resulted in a number of applications from Rutland groups.



2018/19 will see increased levels of activity, and we hosted the Wellbeing Service's first Community and Voluntary Sector Conference in September 2018.

"They provided up to date information about opportunities but also gave us support in our bid to improve the facilities in the village for the wellbeing of residents. The support has been invaluable"

Armed Forces

We are extremely grateful to have secured further support from the RAF Benevolent Fund to continue to provide advice and information to the RAF family in Rutland, and additionally, to provide an outreach advice service at RAF Wittering.

"We have been extremely fortunate to have Citizens Advice Rutland provide advice on station the facility has proved to be extremely popular with service personnel and dependants, as well as contractors and civilians."

The organisation is also pleased to have played a small role in the steering group that secured funding to employ an armed forces officer in the county, and we look forward to working together to continue to build lasting and effective relationships with the wider armed forces families, dependants and veterans in the county.

Wellbeing Advisers

With the support of Better Care Together funding, Citizens Advice Rutland ran a Wellbeing Adviser pilot project at the Uppingham Surgery during 2017/18.

The pilot intended to do a number of things:

- Provide non-medical wellbeing advice and information in an accessible, logical and well used location
- Provide links to other Community and Voluntary Sector support services
- Reduce GP time spent on non-medical wellbeing enquiries.



From an unsurprisingly slow start the service picked up momentum during the year as residents from Uppingham and the surrounding areas became increasingly aware of the provision. Although funding for the service was not available beyond the pilot, the principles of point of access collaboration and integration with Community and Voluntary Sector services has been tested with the opportunity to refine and develop in the future.

The Rutland Information Advice and Support Service for SEND (RIASS)

The Rutland Information Advice and Support Service (RIASS) for SEND provided free impartial, confidential and accurate information, advice and support about education, health and social care for children, young people and their parents/carers on matters relating to special educational needs and disability. The service is statutory and was outsourced from Rutland

County Council. Citizens Advice Rutland delivered the service for most of 2017/18, but unfortunately we were unable to submit a bid to continue to deliver the service with the available funding.

The RIASS service saw **73** clients in 2017/18. **57** cases were successfully resolved at a local level with our assistance, **10** cases went to a Special Educational Needs and Disability Tribunal and the remaining **6** clients only required some advice and/or information and were not in dispute with either the Local Authority or school/college.

96% of clients surveyed stated that they were **very satisfied** with the service with **4%** stating they were **satisfied**.

100% of clients stated that they would recommend our service to others.

"I would never have managed this without your help. Thank you so much – you do not know what this means to me and my family. My daughter is finally getting the help she so desperately needs".

"You are simply the best. The service was professional and cannot thank you enough."

For Rutland

For Rutland is the organisation's fundraising group with the specific ambition to raise funds for Citizens Advice Rutland to employ and train advisers to give advice and information to people with long term health conditions. One in four people in the UK suffer from long term conditions, such as



cancer, strokes, dementia, Multiple Sclerosis, heart disease and mental illness. This affects every part of our community and people of all ages.

The For Rutland group has been extremely successful during 2017/18. For Rutland volunteers have skilfully and expertly staged a number of fundraising events, including the annual Good and New Clothes Sale, the bottle tombola at the Rutland County Show, golf, bridge, riding and running events and much more.



The advisers employed as a consequence of these donations have gained around £1 million over the year for clients with long term health conditions, mostly through helping them to access the welfare benefits to which they are entitled.

Research and Campaigning

As a service we hold a huge amount of insight and data about the problems our clients and their wider communities face.

We can use this insight and data to do several things:

- To help us research issues further
- To influence decision makers to change policies and practices
- To campaign to get decision makers to change policies and practices.

Research and Campaigns work is undertaken at both local and national level. Evidence gained locally is fed into national campaigns as we receive regular calls for evidence from Citizens Advice. This year Universal Credit has been a major target for us nationally and our evidence has influenced changes to this new benefit: for example, the Government implemented the Citizens Advice recommendation to increase the support available for childcare costs.

Locally we intend to focus on our clients' experiences of medical assessments used for deciding sickness and disability benefits,



and we hope to produce a report on this later this year. We have always worked closely with the benefits section of Rutland County Council to ensure that our clients do not suffer further financial hardship since Welfare Reform was brought in.

Information Assurance

The Citizens Advice Rutland trustee board has approved an information assurance strategy, having identified the risks presented by the significant amounts of client data held by the organisation.

An information assurance management team exists to ensure that the confidentiality, integrity and availability of our sensitive data assets are maintained to a level which is consistent with the requirements of our clients, our funders and our strategic partners and data protection legislation.

The organisation has worked hard to achieve compliance with the General Data Protection Regulation and the Data Protection Act 2018.



Thanks and acknowledgements

Citizens Advice Rutland would like to acknowledge the valuable contribution given by a variety of funders and supporters. In particular Rutland County Council, the East Leicestershire and Rutland Clinical Commissioning Group, Oakham Town Council, Uppingham Town Council, Parish Councils, The Royal Air Force Benevolent Fund, The Rutland Trust, National Children's Bureau, our For Rutland fundraising volunteers, and the many donations we receive from clients. We would also like to thank Barnsdale Lodge Hotel for their continued support and generosity.

Thanks and acknowledgement go to our extraordinarily talented and committed volunteers, who demonstrate great skill and care in their support for clients, but also make an immense contribution to shaping the look and feel of the organisation.



Financial Position

As mentioned earlier in this review, from April 2017 Citizens Advice Rutland contracted with Rutland County Council to provide a new Rutland Community Wellbeing Service. As a result the incoming resources in the year were increased to £689,139 (2017: £376,287). Of this £288,084 (2017: £nil) was passed on to our partners in the new Wellbeing Service, and £106,752 (2017: £94,783) related to restricted project activities by 'For Rutland'. As a consequence of the new contract with Rutland County Council the charity became subject to Value Added Tax.

An unrestricted surplus of £8,264 was made in the year. At 31st March 2018 Citizens Advice Rutland unrestricted free reserves were £114,097, in line with the target set by the trustee board.

Summary financial information for the year is shown overleaf.

RUTLAND CITIZENS ADVICE BUREAU
SUMMARY FINANCIAL INFORMATION FOR THE YEAR ENDED 31 MARCH 2018

	INCOME AND EXPENDITURE				BALANCE SHEET			
	Year ended		Year ended		At 31 March 2018		At 31 March 2017	
	£	£	£	£	£	£	£	£
	Unrestricted Funds	Restricted Funds	Unrestricted Funds	Restricted Funds	Fixed Assets: Fixtures & Fittings			
INCOME					Cost	5,139	5,139	
Donations and Legacies	3,670	46,583	10,260	21,319	Depreciation	<u>4,542</u>	<u>3,686</u>	
Charitable Activities:						597		<u>1,453</u>
Grants and Contracts	573,554		264,972		Current Assets:			
Other (including Fundraising)	3,000	59,786	5,000	72,946	Stock	1,955	0	
Other trading activities	578		540		Debtors & Prepayments	12,597	22,229	
Investment Income	1,585	383	732	518	Short Term Deposits	137,929	245,023	
					Cash at Bank & In Hand	<u>66,623</u>	<u>56,745</u>	
						219,104		323,997
					Less: Creditors & Accruals	9,973	8,636	
TOTAL INCOME	<u>582,387</u>	<u>106,752</u>	<u>281,504</u>	<u>94,783</u>	Deferred Income	0	<u>127,524</u>	
						9,973		<u>136,160</u>
EXPENDITURE					Net Current Assets	<u>209,131</u>		<u>187,837</u>
Raising Funds	24,093	16,333	17,821	17,305	NET ASSETS	<u>209,728</u>		<u>189,290</u>
Charitable Activities:					Represented by:			
Advice Provision	218,753	75,620	218,672	64,542	Unrestricted Funds			
Partner Funding	288,084				General Funds ⁽¹⁾	111,597	104,333	
Other	43,193	2,625	45,452	2,419	Designated Funds ⁽²⁾	2,500	1,500	
Support Costs: Staff, Office, Premises					Restricted Funds ⁽³⁾	<u>95,631</u>	<u>83,457</u>	
Governance								
TOTAL EXPENDITURE	<u>574,123</u>	<u>94,578</u>	<u>281,945</u>	<u>84,266</u>	TOTAL FUNDS	<u>209,728</u>		<u>189,290</u>
NET SURPLUS	<u>8,264</u>	<u>12,174</u>	<u>-441</u>	<u>10,517</u>				

This summary financial information is taken from the full accounts of Rutland Citizens Advice Bureau (a company limited by guarantee) for the year ended 31 March 2018. Copies of the full statutory accounts, which include an independent examiner's report, are available from the Registered Office of the Company.

J P Hawksfield

Finance Trustee

Notes:

⁽¹⁾ The Trustees have re-examined requirements for free reserves in the light of predominant risks to the organisation. In the light of these factors, as set out in the statutory accounts, the current target for unrestricted reserves has been assessed at £100,000.

⁽²⁾ Reserves for Property Maintenance.

⁽³⁾ Reserves raised by For Rutland to benefit the Rutland community, initially providing services for those living with cancer, dementia or other long term illnesses or conditions.

We still need your help

Our ability to sustain excellent services relies on the continued support of the wider Rutland community in so many ways, and perhaps more so given the inception of the Rutland Community Wellbeing Service.

- We continue to need volunteers for CAR as well as to support the activity of our Community & Voluntary Sector partners.
- We want to hear from organisations across sectors to support work to engage and strengthen all Rutland communities and people.
- We need Champions who support our work and can assist us to ensure that we are reaching all parts of Rutland with a robust and effective offer.
- We need financial support to ensure we can sustain and grow our provision in response to the varied needs of Rutland residents.



Opening Times:

Monday: 10am – 5pm (telephone appointment available at 5pm)

Tuesday: 10am – 1pm; 1pm - 5pm appointments only

Wednesday: 10am – 4pm

Thursday: 10am – 1pm; 1pm - 5pm appointments only

Friday: 10am – 4pm

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Citizens Advice Rutland is an operating name of Rutland Citizens Advice Bureau Ltd, Company Registration Number: 5287678 (England)
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Authorised and regulated by the Financial Conduct Authority.
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