

Annual Report 2015/16

Kirklees Citizens Advice and Law Centre

Delivering quality advice for
the people of Kirklees



citizens
advice

Foreword

CHANGE has been the theme at Kirklees Citizens Advice and Law Centre for the last few years.

We have merged the CAB with the Law Centre, had sizable budget reductions, moved offices and changed the ways we provide advice. It has challenged us all - staff and volunteers, including my colleagues on the Trustee Board. For our clients - the reason we are here in the first place - we have reduced queuing and we are able to see a greater number than we were seeing previously. Early indications are that clients are well satisfied with our service.

It is a tribute to staff and our volunteers that we have well integrated teams ready to play their part in bringing quality advice services to Kirklees people. On behalf of my fellow Trustees, THANK YOU. For the future, we will continue to improve what we do, working collaboratively with fellow organisations in supporting clients to deal with their problems in difficult times.

Theresa McDonagh
Chair of Trustees

Trustees

During 2015/16 the following people acted as trustees:

Chair:

Theresa McDonagh

Vice-Chair

Anne Pendlebury

Treasurer:

Laurence Campbell

Trustees:

Gulnaz Akhtar

Adrian Cruden

Joanna Gadsby (from 15/05/16)

Judith Priestley

Linda Summers

Stacey Duke (to 15/09/15)

Alison Guest (to 17/11/15)



Our Objectives

The Board of Trustees have set the following strategic objectives for KCALC:

Operational Objectives

- To refine, improve and further develop the new model of service delivery
- To maintain a viable and sustainable organisation in a difficult funding environment
- To maintain and increase service delivery levels including the provision of specialist advice
- To continue the integration of all staff into one way of working, using the same policies, procedures and processes across the organisation
- To develop and implement a volunteering strategy aimed at doubling the number of volunteers within twelve months
- To enhance quality systems and procedures to meet all required quality standards
- To develop campaigning work locally

Strategic Objectives

- To develop effective governance arrangements for a responsive and inclusive organisation
- To develop a regional and national reputation as an effective and innovative advice delivery organisation

Our Services

Advice and information for all

Contact Centres

KCALC staff and volunteers offer assistance to members of the public via our contact centres in Dewsbury and Huddersfield.

They are open from 9.30 to 4.00 every weekday and operate on a drop-in basis. Everyone calling in has the opportunity to access information to help them to resolve their issue.

Staff are available to help and guide people through their options. If more advice is needed then a range of options are available including a face to face appointment with an adviser, a telephone call back or a referral to another service.

The number of people coming into our centres has increased by 65% over the last year but we have made our service more efficient and rarely have a queue.

In April 2015 we designed and introduced our new contact centre in Empire House, Dewsbury. In October 2015 our Huddersfield teams moved into new premises in Brook Street. These have been fully refurbished and are a much more visible presence in the town.

We have worked closely during the year with our partners in Kirklees Council and Looking Local on the development of a **new website tool, 'Better Off Kirklees'**.

This is designed to help clients do more to help themselves when they need to understand their entitlement to benefits, apply for benefits and look for work.

It is helping to take some pressure off advice services and we support clients to use it either in our contact centres or through web-chat.

Telephone Advice Line

The demand for our Telephone Advice Line has grown significantly and the number of calls we answered in the last year was more than double that of the year before.

The advice line is answered from 9.30am to 4.00pm every weekday and is part of a national network of Citizens Advice telephone advice lines which means that callers also have the opportunity to listen to pre-recorded information about some issues. We answer over 65% of all calls and are aiming for over 80% next year.

Our staff and volunteers assist callers in finding information to help with their queries and they can also offer face to face appointments, call backs and referrals to specialist advice teams where necessary.

Our website www.advicekirklees.org.uk has provision for clients to contact us and ask for advice. We usually call back clients who contact us via the website by telephone, although we are happy to respond electronically where this is the best way for the client.

The staff working in our contact centres, on our telephone advice line and at outreach locations are:

Ferhat Bano
Fatema Dudha
Maxine Hunter
Janet Jowitt
Suhra Kalabic
Asia Majid
Angela Metcalfe
Emsuda Selman
Sharon Smith
Linnet Thornton

Other Frontline Advisers are employed by Kirklees Council.

Outreach Centres

We also offer a service in a number of outreach locations located in the premises of other organisations.

The majority of these are Surestart Children's Centres but they also include libraries and other community venues.

Staff employed at these locations will help connect potential clients to our service and an adviser can arrange a call back and/or face to face advice at the outreach.

We are pleased to work in partnership with other local agencies to deliver this service.

Case Study

A woman called our Telephone Advice Line and an advisor called her back to undertake a benefits check.

We discovered she was entitled to Working Tax Credits so helped her to make a claim.

Although the amount she will receive is relatively small, as she was struggling financially she feels it will make a big difference to her life.

**“ Exceptional!
Simply couldn't have expected any more.”**

Specialist Advice

Public Law

We were pleased in 2015 to obtain a contract with the Legal Aid Agency in Public Law.

Where clients who are eligible for Legal Aid need to address issues with a public body and have exhausted all other avenues they can apply for a Judicial Review through the courts.

Many of these cases are very complex and it is important that we can provide this service.

Community Care

We assist clients who need help to access social or care services. Clients can receive Legal Aid to resolve issues if they meet eligibility criteria.

We can handle their case up to and including representation in court proceedings.

Clients using this service are usually among the most vulnerable that we assist and we have built up considerable expertise over many years in dealing with their specific needs.

Staff dealing with NHS Complaints, Public Law and Community Care are Nina Stansfield and Ginny Woolfenden.



NHS Complaints Advocacy Service

We deliver the NHS Complaints Advocacy service in Kirklees where we assist clients who wish to make a complaint about their medical services or care.

We help them to put their case so that the NHS addresses issues of concern to their service users. We aim to get an acknowledgement from NHS services that there has been an issue, an apology for patients and a change in practice so that problems do not recur.

We support clients at local resolution meetings and, where necessary, assist clients to refer matters to NHS England or the Parliamentary & Health Service Ombudsman.

We are pleased that we have secured this contract for a further three years.

Case Study

A client approached our NHS complaints and advocacy service about the treatment of her son who died after an overdose of opiates.

She felt that insufficient medical opinion had been sought when decisions were made about his care and that no support had been provided when he returned home.

We helped her to obtain the information she needed to make a complaint and provided advocacy when she attended meetings with agencies about the issue.

We also assisted her with her contribution to the inquest into her son's death. This included helping her draft statements and submissions, and informing her about the legal situation and processes.

As a result of our support changes have been made to policies, procedures and the referral pathway for those with similar issues. All the agencies involved have reviewed their practice in line with the recommendations of the inquest and internal reviews have been conducted.

Pension Wise

We are one of 50 local Citizens Advice who have been delivering the government's Pension Wise service for over a year.

Launched in April 2015, Pension Wise was a new guidance service set up to help people understand their options under the pension freedoms. We deliver face to face Pension Wise appointments to people aged 50 and over with a defined contribution pension.

For 2015/16, Pension Wise has delivered 61,200 appointments across the service in England, Wales, Scotland and Northern Ireland.

People visiting Pension Wise are pleased with the guidance they are receiving with satisfaction ratings remaining consistently high. In April 2016, Pension Wise achieved a satisfaction score of 88.5%.

Financial Capability

We have been successful in obtaining funding from various sources to carry out financial capability work with our clients to enable them to handle their financial affairs better.

This has included work to help people change their energy supplier to obtain the cheapest possible deal. We have recently been successful in obtaining funding to run a regular financial capability forum for advisers in the Yorkshire and Humber region. We also offer budgeting advice to clients who are being moved on to Universal Credit.

Our Financial Information Team, which includes Pension Wise, is Craig Eastwood Sue Howard and Peter Sales.

Case Study

A client had a pension plan worth about £55,000 and wanted to know about his options.

During our discussion it was discovered that he had debts of £23,000 and was hoping to use his pension fund to pay it off. He also had various health issues and was in receipt of some benefits. The worry and stress of his debts were not helping his situation.

We explained his pension options, including the potential impact on his benefits if he took a large cash sum or additional income. We then referred him to our Debt Team for further help the same day.

As a result of our advice he was able to use some of his lump sum to make an arrangement to pay off his debts in full, which greatly alleviated his worry and stress.

The information he had been given by our Pension Wise worker meant he could ensure that this did not impact on his benefit income. It's also enabled him to leave the rest of the fund in his plan to make additional income.

“Excellent impartial advice clearly explained and no sales pressure.”

Asylum

Clients who wish to claim asylum in the UK can be helped by our Legal Aid contract.

We deliver this service across Kirklees and also have a base in Wakefield. We can prepare the case and represent at tribunal on behalf of our clients.

Our asylum team consists of Feddus Ali Raashida Daud and Matthew Middleton.

Case Study

Our client arrived in the UK as a spouse. As her husband did not apply for her stay to be regularised, she became an over-stayer for 2½ years.

Her husband subjected her to domestic abuse and eventually, following a severe assault, she fled to a refuge and was referred to us for help.

We gathered evidence to prove she was a victim of domestic violence and got her a concessionary visa so she could access benefits to cover the cost of her stay at the refuge.

We successfully got her exemption from paying the Home Office fees of £1875 on the grounds of destitution, and ensured she was granted Indefinite Leave to Remain.

Case Study

Our client was a young girl who was trafficked into the UK. She was forced into prostitution and was severely abused. Her perpetrators then left her on the streets.

The traffickers had provided her with an identity which stated she was older than she actually was. When she approached the Home Office with the help of a Church, they did not accept her age or identity and she was refused asylum. That is when she was referred to us.

We worked hard to liaise with various organisations and an independent age assessment was completed. We gathered evidence that she was a minor, that she had been trafficked and faced a real risk of being re-trafficked if returned.

After battling with the Home Office, we went on to represent the client at the tribunal. We succeeded in getting her leave to remain as a refugee with her correct name and details.

If we had not been involved she would have been returned to Uganda where she would be homeless, destitute and facing the prospect of being trafficked all over again.

Welfare Benefits

We can assist clients with completion of complex forms such as those for Employment Support Allowance and Personal Independence Payment.

This is usually done by trained volunteers, and we have received additional assistance with this from students seconded to us from the Huddersfield University Law Clinic.

Where clients are refused benefits we can assist them to request mandatory reconsideration and then in making an appeal if required. This support is provided by our Advice Kirklees team in partnership with Kirklees Council.

For clients whose case has been refused at tribunal we provide a specialist service for appeals to the Upper Tribunal funded by Legal Aid.

The Upper Tribunal Appeal service is delivered by Joe Power and Ginny Woolfenden.



Case Study

A disabled client dropped in to our Contact Centre to enquire about any possible effects on his benefits if he worked more hours as his health was improving.

We arranged for him to have a telephone call back to discuss his situation and to undertake a benefits check.

Our adviser discovered that he was unaware that he was entitled to the Severe Disability Premium on his Employment Support Allowance (ESA).

We were able to give him the support he needed to make a claim which added £61.35 to his weekly income and over £2,000 was paid in arrears.

The adviser was also able to inform him that if he did work more hours and lost his entitlement to ESA, that the premium could be applied to his Housing Benefit to reduce the rent he would have to pay.

This new knowledge means that he feels more financially secure in searching for more hours of work.

Debt

The Money Advice Service fund our debt advice work with clients who have financial issues.

Staff work with clients to help them manage their affairs and deal with their creditors. We have been successful in having debts written off and we often get payments reduced or suspended.

We assist clients with Debt Management Plans, Individual Voluntary Arrangements, Debt Relief Orders and Bankruptcy. Kirklees Council also fund us to deliver debt advice to those who have tenancies with them.

Our Debt Team are: Karen Bentley, Graham Fearnley, Wendy Forrest, Steve Frain, Charlie Frielick, Charles Greaves, Katie Hellowell, Shereen Rebbla, Richard Taylor, Martin Whitaker and Cheryl Williamson.

“Due to my husband’s accident, losing the business and finding myself in debt, I was in a very dark place.

You were the light at the end of the tunnel that helped me and I can never thank you enough for what you have done.”

Case Study

Our client had an unpaid magistrates court fine of £100 for a driving offence. This had now been passed to a collection agency and with additional fees the sum owed had grown to £410.

He had been sanctioned when applying for benefits because he had not attended a medical appointment and now had no income. He was living with his mother who was threatening to evict him because of the stress caused by attempts to recover the money he owed.

We informed the collection agency that he was vulnerable because of mental health issues, confirmed by a doctor’s letter. We got the fine transferred back to the court and the additional charges removed.

A relative gave him £50 towards the debt and the court allowed a period before the remaining £50 needed to be paid. We also referred him to other members of our advice service for assistance with making claims for benefits.

With the collection agency no longer making attempts to recover the money, his mother was happy to allow him to remain living at home.

Employment

We are able to provide a specialist telephone advice service for people in Kirklees with employment issues.

This is a well used service with over 1000 clients in 2015/16.

The issues with the most enquiries were unlawful deduction of wages and unfair dismissal but all other employment issues were handled.

Following government cuts to Legal Aid we are limited in the casework support we can offer to clients but our advice can assist them to prepare their own cases or to make the decision that it is not appropriate to proceed further.

Our employment helpline is staffed by Steve Collins and volunteers.

Case Study

A client called our employment advice line to discuss his situation.

He had passed retirement age and had an agreement with his employer that he would (after turning 65) continue to work for one day per week.

This continued when the company was taken over but the new employer decided they only wanted people who were prepared to work a five day week.

As our client did not wish to return to full time, he was eventually told by a manager that he "would no longer work there".

We provided the client with advice about his legal position and ways to proceed. The case was finally settled in his favour.



“I was immediately given valuable information and within an hour, my enquiry had resulted in a huge amount of support for my case.”

Research and Campaigns

Although we usually work with individual clients, on occasion our staff become aware of problems which are affecting more than one person and causing a detriment.

Often these are as a result of national policy decisions but they can also be more local issues.

Where it is possible we contribute statistics and information to national campaigns which are coordinated by organisations such as Citizens Advice or Law Centres' Federation.

They use this to build up a picture of how situations affect individuals and of the severity of the problem which is evidence to challenge national decision makers.

Where local issues arise that affect many people we hope to be able to challenge the decision makers ourselves. We find that it is often as a result of how local public bodies interpret and implement guidance or local systems that are created. Sometimes they involve access issues.

Our research and campaigns work is headed up by Kirsty Dickinson assisted by volunteers.

Case Study

A staff member complained to the Courts and Tribunal Service in West Yorkshire that they would not speak to KCALC staff members about individuals even when they had authorisation from our clients to do so.

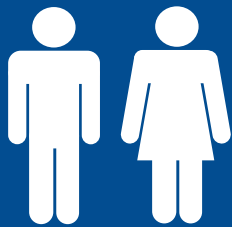
This made it especially difficult for our debt workers when speaking to the magistrates' courts and the collection services about payments owed and trying to negotiate payment schedules for our clients.

Following the letter sent to them, the Courts and Tribunal Service have agreed to change their policy and to correspond directly with KCALC when they have a client's written authorisation to do so.

This change will make a difference to our current and future clients who owe money to the court.

The negotiations and discussions with the court can now be carried out by a debt professional which will improve the clients' situation and lessen their stress and anxiety.

Our Services



**25,348
people**

in the Kirklees area
received our help
during 2015/16.

95%

were happy or
very happy
with the service
they received.

91%

said their query
was resolved at
their first contact
with us.



**11,773
people**

received our
service via
telephone.



**13,575
people**

received our
service face
to face.



**4,976
people**

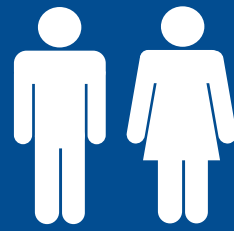
accessed our
website.



£8.1m
of debt
managed

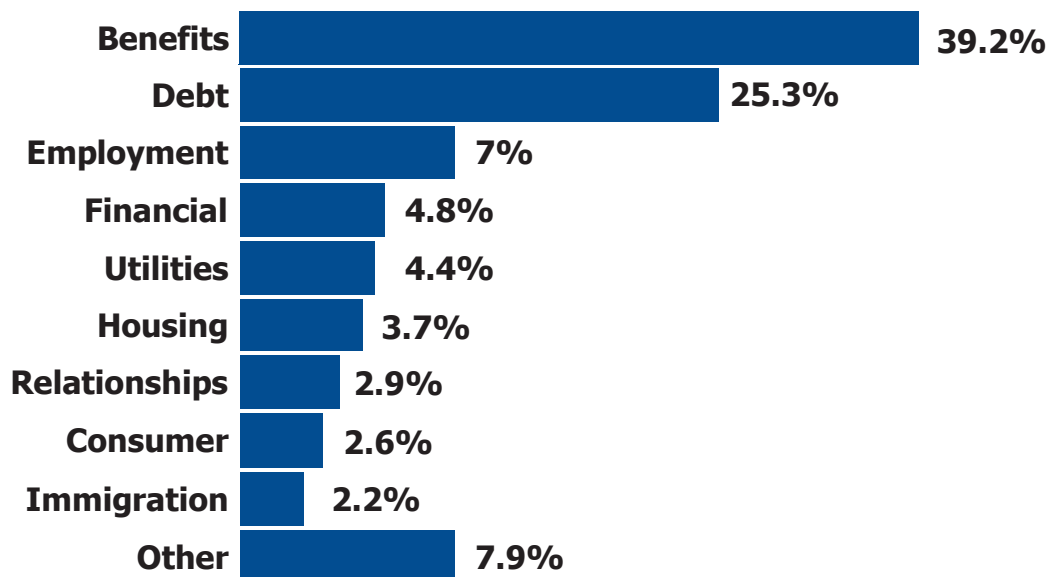


£13.8m
secured in
benefits



47 clients
represented
at tribunal

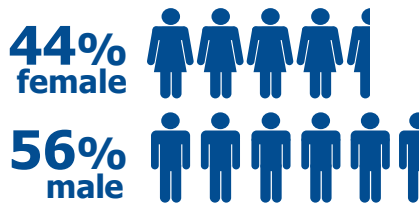
Issues dealt with in 2015/16 (by % of total):



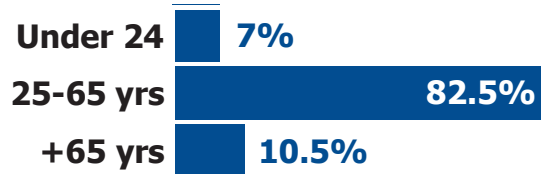
42%

of our clients have a
disability or long term
health condition

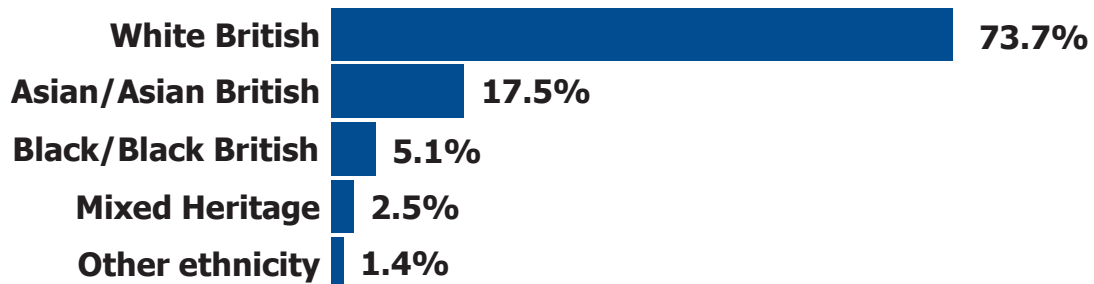
Client gender



Client age



Client ethnicity



We provided advice in 26 languages:

- | | | |
|-----------------------|-----------------|------------|
| Albanian | Kurdish Sorani | Russian |
| Armenian | Kurdish Badhini | Somali |
| Amharic | Kurdish Kumanji | Spanish |
| Arabic | Lingala | Swahili |
| British Sign Language | Mandarin | Tigrinya |
| English | Mandingo | Urdu |
| Dari | Portuguese | Vietnamese |
| Farsi | Punjabi | Wolof |
| French | Pushto | |

Our Volunteers

Volunteers play a vital part in delivering our services and are involved at all levels of our organisation.

Volunteers act as Advice Guiders in our contact centres and on our Telephone Advice Line helping people to find information to resolve their issues. They give advice in appointments with clients, help with administration, work on campaigns and research, and some volunteers are specialist advisers in specific areas of law.

Our Board of Trustees which governs the organisation and is legally responsible for its direction is also made up of people who volunteer their time.

KCALC would not be able to help as many clients and offer so many different services without our volunteers, some of whom have been with us for many years. We offer them training and experience in the advice field and help them to develop skills that many can use in future employment.

Our volunteers come from many different backgrounds and bring a wealth of life experience to KCALC. We are always recruiting for new volunteers and information about how to apply can be found on the Advice Kirklees website.

Our Training Supervisor is Julie Ashton.

“The support provided by members of staff is second to none. You always feel like one of the team.”

Case Study

“After retiring from a career working in industry in a management and financial capacity, I decided that I would like to do something different where my experience may prove useful.

The CAB training exposed how little I knew in detail about subjects such as the benefits system and the actual experience of dealing with clients proved to be an eye opener, revealing the complex and difficult problems some people encounter and the struggles they face on a day to day basis.

The job can be both exasperating and occasionally upsetting but satisfying as well and I’ve met some genuinely nice people along the way.

Time well spent as far as I’m concerned and maybe I’ve become a bit more tolerant in the process.”

Volunteers 2015/16

Rachel Ackroyd
Azra Ali
Aleksandra
Bartoszelwska
Terri Bell
Julie Burgin
Naseem Butt
Leon Chu
Ruth Davies
Anne Douglas
Robert Dransfield
Patricia England
Michael Evans
Lydia Furman
Kierraleigh
Gardner-Robson
Sue Guppy
Rachel Grogan

Faruk Hajat
Leila Hanson
Peter Hart
Diane Hornsey
Alina Hussain
Samina Hussain
Sohaib Hussain
Zonia Iqbal
Clare James
Saima Kauser
Samina Kauser
Aysha Kayat
Stacey Knight
David Lawrence
Jolene Lee
Vera Mackin
Thomas Martin
Peter McKenzie

Peter Millen
Avis Nunn
Simon Oakley
Kulsum Pandor
Rumanah Patel
Shanaz Patel
Shabana Pathan
Brenda Robson
Faizan Saeed
Paul Sands
Marion Simmers
Tracy Sugden
Elizabeth Stevens
Andrew Stock
Ann Strain
Laiba Tanvir
Christine Thorburn
Sharon Weed

List correct at September 2016.



Finances

The organisation has faced significant cuts (50%) to core funding implemented in two equal stages over the period 2015-17.

This financial year has seen the initial impact of that and we have planned for further savings during 2016-17. There is also a need to secure additional sources of funding in order to maintain the viability of the organisation in the longer term.

We have a Development Manager in post and we have specifically planned to expend management and staff resources in order to identify and tender for new funding.

There has been considerable change during 2015-16, including the introduction of a new service delivery model which succeeded in maintaining support for the same number of clients despite the reduction in funding, a move in premises in Huddersfield, and an overhaul of IT and telecommunications systems.

As part of our collaborative work with Kirklees Council, we have integrated staff from Kirklees Benefits Advice Service into our Advice Kirklees model. Some consolidation will be required during 2016-17 as these dramatic changes settle.



Financial Statement

Income

Council and Community	£1,306,624
Money Advice Service	£256,285
Big Lottery (Transforming Advice Services)	£71,003
Big Lottery (Pathways to Integration)	£8,740
Investment income	£2,454
Income TOTAL	£1,645,106

Expenditure

Staffing (Salaries, NI & pensions)	£1,004,424
Premises	£122,135
Office overheads	£129,802
Training & travel	£17,294
IT	£17,192
Information Subscriptions	£10,376
Interpretation	£1,705
Support Costs	£22,814
Lead body payments (Fusion Housing)	£253,159
Depreciation	£66,900
Loss on sale of tangible fixed assets	£14,401
Expenditure TOTAL.	£1,660,202

Our Unrestricted Reserves at 31st March 2016 were £575,807.

A full copy of our audited Accounts for 2015/16 is available on request.

Overview

Transformation of the Service

This Annual Report would not be complete without setting it in the context of the huge transformation of the service that has taken place over the past two years.

This transformation has come from a confluence of our own long term strategic thinking, influences from various partners and, increasingly, of funding pressures.

For some years the idea of merging our Citizens Advice and Law Centre organisations had been discussed.

Our vision was of a single advice service which could support clients across the breadth of social welfare law issues and with the expertise to provide that support from initial information through to representation at tribunals and to the highest courts if required.

In April 2014 we completed our merger to form Kirklees Citizens Advice & Law Centre.

The vision of a single advice service also chimed with Kirklees Council and we have worked with them to integrate their Benefits Advice Service, while also maintaining our close partnership with Fusion Housing, to create a single point of entry for advice under the banner of Advice Kirklees.

We are all well aware of 'austerity' and the resulting cuts to public funding. Across the country, the advice sector has been hit

disproportionately hard at a time when there is increasing need for our services.

Specialist advice in areas of social welfare law has been removed or significantly restricted by Government slashing of Legal Aid in 2013.

Funding pressures on our local authority are severe and required 50% cuts to the advice budget in Kirklees in the past year.

In looking at the external environment, we have understood the need, mirrored by thinking in our local authority, to support and empower clients to do more themselves and to engage with increasing requirements to use telephone and digital technologies.

We have embraced these technologies ourselves to improve access to and efficiency of our services. The service we provide now looks very different.

We have two Contact Centres that clients can attend without appointment and get immediate access to information or, where required, access to telephone or face to face assistance.

We have an enhanced telephone call centre, and we have worked closely with Kirklees Council in the development of an online tool to support benefits advice.

We have maintained specialist services as far as possible and clients can be passed seamlessly through to specialists where needed.

This transformation has allowed us to support twice the volume of clients in 2016 than we were able to a year ago.

Waiting times for clients 'dropping in' have gone. More clients are able to get through on the phone and we are answering them more quickly.

Waiting and delay has always been the biggest complaint of clients, and an important outcome of these changes is a significant improvement in client satisfaction with our service.

As well as changes to the service, the past year has seen significant changes to our infrastructure:

- a move in premises of our Huddersfield operation,
- changes to our Dewsbury premises to incorporate the new look Contact Centre,
- the development of an automated system to book in clients arriving for pre-booked appointments,
- a new single telephone system for the organisation,
- and a re-vamp and upgrade of our computer network.

The major transformation is complete, but we are mindful of the need for continual improvement, adjustment, and development of services to meet the challenges of technological advance and ongoing funding pressure.

Above all, transformation of this magnitude involves changes of mindset – for trustees, managers, staff, volunteers and clients – and we all need to keep working on that.

In achieving the above I would like to note my particular thanks to Mark Lacey, my predecessor as Chief Executive, who was a

driving force behind much of this, and to Steve Bird at Kirklees Council who has been a valuable and supportive partner.

My thanks also to our Trustees, who have understood the context and have had to make some difficult decisions and trust us to carry them out.

Also to my Executive Management Team, who have led on and delivered this, and most of all to our staff and volunteers who have supported the transition and made it work so well.

Nick Whittingham
Chief Executive

Our Executive Management Team

Chief Executive
Nick Whittingham

Compliance Manager
Darren Grosvenor

Operations Manager
Lesley Kaye

Finance Manager
Ian Parkin

HR, Data and Campaigns Manager
Kirsty Dickinson

Development Manager
Anne Hudson



Our Thanks

We are supported by Citizens Advice and Law Centres' Network.

We wish to thank all our funders:

Big Lottery Fund
Citizens Advice
Money Advice Services
Pension Wise
Calderdale Council
Community Spirit
Crossroads Centre

Cuckoos Nest
Kirklees Council
Department of Energy and
Climate Change
Legal Education Foundation
Legal Aid Agency

Our partners during 2015/16:

Fusion Housing
Kirklees Council
Looking Local
Healthwatch Kirklees
Cloverleaf Advocacy

Money Advice Services
North East Regional Law Centre
St Augustine's Centre Halifax
Wakefield CAB
Calderdale CAB

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"Dewsbury Minster" - SMJ

"Huddersfield from Castle Hill" - Techiedog

"Kingsgate Shopping Centre" - Steve Jaikens

Additional photos provided by KCALC.

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Also at:

1 & 3 Brook Street, Huddersfield, West Yorkshire HD1 1EB

www.advicekirklees.org.uk

Citizens Advice and Law Centre is a Company Limited by Guarantee and a Charity.
Company number 4259550 and Charity Number 1088651

Kirklees Law Centre is a wholly owned subsidiary of KCALC.
Company number 5470398 and Charity Number 1112885