Agenda Item No 7

Additional Information Supplied by the Citizens Advice Bureau

A. Information requested by the Director of Resources following the meeting of the Committee on 16 July 2012

1. In terms of confidentiality, are there occasions when you wouldn’t be able to guarantee this, for example, what would you do if somebody told you something that involved criminal activities or child protection issues?

2. The Committee has asked to see quarterly usage information for 2012/13 but asked if it would be possible to provide a further breakdown of the 581 issues for 2011/12 and continue to provide a breakdown for the quarterly information – mainly around the reason for the contact e.g. debt advice, relationship issues, planning, etc. It would help them to understand the type of query that you deal with.

3. The satisfaction survey for April 2012 was noted but the sample size of 16 clients was felt to be too low to be representative. Would it be possible to do another satisfaction survey prior to September 2012 using a larger sample size? Do you know why you chose 16 clients?

4. On the satisfaction survey, one comment was noticed which said ‘have appointment times shorter’ – do we know what prompted this comment and can we learn anything from it?

5. Do you have any comparative statistics (I can see if we can find anything from the previous provider) that lead you to believe that we are reaching the people we need to – how does our number of clients compare to South Ribble for instance? Are there any national CAB statistics that we could benchmark usage against?

6. Members also suggested that there are other providers such as free legal aid, etc – do you have a view about whether the services you offer can be met by other providers?

7. Do you have any information that tells you whether your CAB advice resulted in increased benefit take-up?

B. Response from Diane Gradwell, district Manager Lancashire West Citizens Advice Bureaux

1. Confidentiality - Please see our Adult at Risk (Appendix 1) and Child Protection Policies (Appendix 2) - attached

2. Client Breakdown by Enquiry - Please see reports for 2011-12 (Appendix 3) and Q1 2012-13 (Appendix 4). These reports show enquiry category by ward – attached.

Following the comments made I asked the face to face adviser to survey all clients at the end of each interview. However, we have to do telephone gateway satisfaction survey differently (ie by random sample) as they are more problematic for the following reasons:

- Clients pay for the telephone call and it would be inappropriate to ask them to increase that cost by staying on the line to undertake a survey;
- Clients are asked if they consent to be contacted later;
- Clients are, therefore, called later and they may or may not be available;
- Clients have moved on with their enquiry and do not always want to re-engage;
- We currently have 11 project including Wyre CAB. Increasing the sample size for telephone gateway on all our projects is not possible within available resources – it would probably take a dedicated staff member working on this alone.

4. Client Comment - I don’t know anything about this particular comment. We allocate 1 hour per appointment, but this can fluctuate dependent upon the complexity of the issue.

5. Comparative Data - It is impossible to compare this service with the old Wyre CAB or even any of our other generalist services in Chorley, South Ribble and shortly West Lancs as all had/have a bureaux and volunteer staff. (Please see my note below about future developments.)

6. Other Advice Providers:

- Legal Aid – As you may be aware all social welfare law, as currently delivered, is coming out of scope of legal aid end-March 2013. What remains will have a very narrow eligibility criteria around these subject areas, which will exclude the majority of people. I also understand that the allocation of new matter starts (NMS - ie cases that can be done under legal aid) for the whole of West Lancashire in all subject areas has also been slashed to around the 600 mark – just as a comparison we used to have 625 NMS in debt alone just for Chorley and South Ribble.
• Other Advice Providers – There is no other advice provider working in Wyre who delivers an holistic free, confidential and impartial advice service in all subject areas. There are providers such as Help Direct, but like that service they are mainly signposting agencies. I have attached a paper giving some further information, which you might find useful – see Lancashire West CAB Service Overview (Appendix 6).

• Benefit Take Up – This is not one of the outcomes recorded on the generalist service (such as the one in Wyre) we do have it for our RBL project, which covers Wyre as well as other areas in Lancashire. I have attached a copy of that report for the last full year for your information (see Citizens Advice/TRBL Project Quarterly Stat Report (Appendix 7) – it says Chorley, Cit Ad haven’t changed our name yet). As you will see our RBL project outcomes are over 400% far in excess of the national average.

7. Future Developments: Under the current contact we have increased outreach sessions in excess of those stipulated because of demand. However, we cannot increase further without having a dedicated workforce to deliver services. What we propose is embarking on a “Volunteer Outreach Project” based around a hub at one of our outreach locations in Fleetwood. Volunteers will then have a single point of contact with dedicated supervision and support for their outreach work. This will increase access for Wyre residents as well as giving even better value for money.

Supporting documents referred to above are set out in the following appendices.

Appendix 1   Lancashire West CAB Adult at Risk Policy
Appendix 2   Lancashire West CAB Child Protection Policy
Appendix 3   Ward Breakdown of Client Enquiries 2011/12
Appendix 4   Ward Breakdown of Client Enquiries 2012/13
Appendix 5   Client Satisfaction Survey Report, Q1 2012/13
Appendix 6   Lancashire West CAB Service Review
Appendix 7   Benefits Take-up and Money Advice Project – Performance Summary

C Additional queries raised by the Director of Resources to the CAB

1. My queries were as follows:

1. Is there a key you could let me have showing what each of the abbreviations mean on the analysis of Client Breakdown by Enquiry?
2. The last report we took to Cttee in July 2012 which showed the 2011/12 Clients by LA ward indicated that there were 353 telephone enquiries and 228 face to face – giving a total of 581 enquiries. The most recent report enclosed (Clients by LA ward) for 2011/12 now shows a total of 679 – do you know why there is a difference?

3. Referring to the client survey for 2012/13 whilst you mention that there were 20 telephone gateway clients, it is silent on how many face to face clients completed the survey and therefore how many people were asked in total. Can you let me know the number who took part?
Adult at risk protection policy

General principles

People seeking advice or other help should feel safe and be able to trust the Citizens Advice Bureau service. Bureaux and those who work with them in any capacity have a responsibility to protect the CAB service by safeguarding clients and the wider community, particularly children and adults at risk, from harm and abuse of all kinds.

Judgements relating to client protection will err on the side of protecting clients from possible risks or perceptions of risk which may deter someone in need from using the service.

All staff, voluntary and paid, and trustees will adhere to the policy and guidelines. Failure to do so could have implications for the CAB as a provider of services and to its reputation.

The aim of the policy is to ensure the bureau has procedures to provide a speedy and effective response for dealing with concerns about an adult at risk.

It is important to remember that a person is not inevitably ‘at risk’ just because of their age, frailty or disability. For instance, a person with a disability who has mental capacity to make decisions about their own safety could be perfectly able to make informed choices and protect themselves from harm. In the context of safeguarding adults at risk, the vulnerability of the person is related to how able they are to make and exercise their own informed choices free from duress, pressure or undue influence of any sort, and to protect themselves from abuse, neglect and exploitation. It is important to note that people with capacity can also be at risk of abuse and exploitation.

Within this policy, an adult at risk is defined as anyone who has reached the age of 18 and either:

- is in residential accommodation
- is in sheltered housing
- receives domiciliary care
- is detained in lawful custody
- is under supervision by virtue of an order of a court
- receives welfare service of a prescribed description
- receives payments (personally or via a third party) under the Health and Social Care Act 2001
- requires assistance in the conduct of their own affairs
- requires assistance due to age, health, physical or mental disability or substance abuse.

An adult at risk may be a person who:

- is frail due to age, ill health, physical disability or cognitive impairment
Lancashire West Citizens Advice Bureaux

- has a learning disability
- has a physical disability and / or a sensory impairment
- has mental health needs including dementia or a personality disorder
- has a long-term illness or condition
- misuses substances or alcohol
- is a carer, such as a family member, who may be at risk because of their caring role
- is unable to demonstrate the capacity to make a relevant decision and is in need of care and support.

(This list is not exhaustive)

The welfare of our clients is paramount. Adherence to these guidelines protects adults at risk and also bureau staff and the reputation of the service.

General

It is recognised that Lancashire West Citizens Advice Bureaux (CABx) staff often work with those who are defined as adults at risk. Citizens Advice is committed to ensuring that such clients are protected from any potential form of harm or abuse whilst using our services.

Where allegations of abuse against an adult at risk are made, these will be reported to Diane Gradwell, the District Manager.

Lancashire West CABx recognises that client welfare is paramount, that vulnerable adults regardless of gender, ethnicity, sexuality or beliefs have the right to be protected from abuse. The bureau will take all allegations of abuse against an adult at risk seriously.

Procedures following allegation or suspicion of abuse

The person responsible for dealing with allegations of abuse against an adult at risk is: Diane Gradwell

If s/he is not available, the deputy is: John Taylor (Chair)

You might have reason to believe that an adult at risk is subject to emotional, physical, sexual, financial abuse or neglect. If an allegation of abuse is made by an adult at risk or a third party:

- The adviser will make a note of the time and date that the allegation was made, who made the allegation, and the nature of the allegation.
- The adviser will record only the facts, preferably in the language / words used by the person making the allegation, and will not ask any questions which may seem to be ‘leading’.
Lancashire West Citizens Advice Bureaux

- The adviser will then report the allegation to their Manager immediately - and the person making the allegation will be made aware that this will happen. The person making the allegation will also be made aware that whilst the Manager will not automatically report the allegation to the authorities, this may be a possibility.
- The bureau will not participate in any form of 'investigation', i.e. must not start a process of ‘fact finding’. If the bureau is subsequently required to take part in a criminal investigation or a Serious Case Review, the Manager will speak to Bureaux Direct.
- In the majority of cases the bureau should offer to support the person making the allegation and make them aware of the options that are available to them i.e. contacting the local social services or police. In some cases the adviser may offer to help them make initial contact with these agencies.
- If, however, there is a clear and immediate danger to an individual then confidentiality will be broken, and priority given to the safety of that individual.
- Equally if a client or third party makes an allegation of abuse, and it becomes clear to the bureau that no further action has been taken since the interview, then it may be that the bureau decides to take steps to report the allegation.

If the manager is considering reporting allegations of abuse and / or breaching confidentiality, they will seek the assistance of Bureaux Direct.

Protecting adults at risk from harm or abuse and staff / volunteers from allegations of abuse

No member of the bureau staff will:

- visit an adult at risk in their home unless on an official pre-arranged visit
- transport an adult at risk alone in their car unless prior arrangements have been made with the bureau manager or in case of a medical emergency
- make any comments with sexual overtones, even in humour, or partake in any 'horse play' with an adult at risk
- allow an adult at risk into their home
- engage in rough physical games – apart from structured sports activities which may be part of a community event etc.
- allow or engage in inappropriate touching of any form
- allow an adult at risk to use inappropriate language unchallenged
- make sexually suggestive comments about or to an adult at risk, even in fun
- let allegations an adult at risk makes go unchallenged or unrecorded
- do things of a personal nature for an adult at risk that they can do for themselves
- lend money to or borrow money or possessions from an adult at
Lancashire West Citizens Advice Bureaux

risk. They will not agree to make any purchases, or undertake any financial transactions, on behalf of the client.

In addition:

- If the client has access to third party support i.e. a social worker, then it is advisable for that person to attend appointments at the bureau, if possible.
- If an adviser has any concerns about visiting an adult at risk on their own, then steps should be taken to ensure another staff member attends.
- Anyone undertaking home visits must have been CRB-screened, - this requirement has been in place since 2002.

Further precautions

Recruitment

Lancashire West Citizens Advice Bureaux will ensure that sound recruitment practices are in place to ensure that anyone considered to be a risk to adults at risk does not enter the CAB service. The following precautions will reduce this risk:

- Anyone applying to work for the bureau will be interviewed and asked to provide two references from former employers.
- If an applicant is unable to provide employer references, they should provide references from a community leader etc.
- Anyone who is selected for interview or to begin training within the bureau will be asked to disclose details of any unspent convictions.
- The bureau must get a full CRB check for certain roles as defined in Citizens Advice policy. This includes roles targeted at adults at risk or who will be advising people in their homes.
- Thorough induction training will be provided to ensure that staff / volunteers are aware of the service’s core values, confidentiality and best practice.
- Staff and volunteers will be given regular supervision and have training needs assessed.
- Regular case checking should be adopted and any unusual or excessive contact with a vulnerable adult recorded.

Regular review of policies and procedures

The bureau’s adult protection policies and procedures will be reviewed annually. Necessary changes that are identified in the interim period, as a result of amendment to legislation, will be made as required.
Child protection policy

**General principles**

People seeking advice or other help should feel safe and be able to trust the CAB service. Bureaux and those who work with them in any capacity have a responsibility to protect the CAB service by safeguarding clients and the wider community, particularly children and vulnerable adults, from harm and abuse of all kinds.

Judgements relating to client protection will err on the side of protecting clients from possible risks or perceptions of risk, which may deter someone in need from using the service.

All staff, voluntary and paid, and trustees must adhere to the policy and guidelines. Failure to do so could have implications for the CAB as a provider of services and for its reputation.

The aim of the policy is to ensure that the bureau has procedures to provide a speedy and effective response for dealing with concerns about a child or young person aged under 18.

Within this policy a child is defined as anyone who is under the age of 18.

**General**

It is recognised that Lancashire West Citizens Advice Bureaux (CABx) staff do not often work with children under the age of 18 years. However, the bureau service is open to all and children and young people may visit for advice.

Where allegations of abuse against a child are made, these will be reported to Diane Gradwell, District Manager or in her absence John Taylor, Chair of the Trustee Board.

Lancashire West CABx recognises that child welfare is paramount, that all children, regardless of gender, ethnicity, disability, sexuality or beliefs have the right to be protected from abuse. The bureau will take all allegations of abuse against a child seriously.
Procedures following allegation or suspicion of child abuse

The District Manager, will deal with allegations of abuse against a child. The Project Support Caseworker will be the deputy.

You might have reason to believe or suspect that a child is subject to emotional, physical, sexual abuse or neglect. If an allegation of abuse is made by a child or a third party, the adviser will:

- make a note of the time and date that the allegation was made, who made the allegation, and the nature of the allegation
- record only the facts, preferably in the language/words used by the person making the allegation, and will not ask any questions which may seem to be ‘leading’
- immediately report the allegation to the District Manager. The person making the allegation will be made aware that it may be necessary to breach confidentiality
- The bureau will not participate in any form of “investigation” i.e. must not start a process of “fact finding”. If the bureau is subsequently required to take part in a criminal investigation or a Serious Case Review, the District Manager will speak to Bureaux Direct.

With the child’s permission (or the permission of the person making the allegation) the bureau will contact social services or the police. If the child refuses permission (or it is not possible to get permission) it will be explained that the seriousness of the situation is such that we will need to consider breaching our principle of client confidentiality. The District Manager will immediately contact the national NSPCC helpline on 0808 800 5000 where experts will advise on the most appropriate course of action to take.

If the District Manager has any reservations about breaching confidentiality, they will seek the assistance of Bureaux Direct, within 24 hours of the original allegation being made. The bureau will then be advised on what course of action to take, and how to report the matter to social services should this be deemed appropriate.
Protecting children from abuse and staff / volunteers from allegations of abuse

No member of the bureau staff will:

- visit a child in their home unaccompanied
- transport a child in their car unless prior arrangements have been made with the District Manager or in case of a medical emergency
- make any comments with sexual overtones, even in humour, or partake in any “horse play” with a child
- allow a child into their home
- engage in rough physical games – apart from structured sports activities which may be part of a community event etc.
- engage in sexually provocative games
- allow or engage in inappropriate touching in any form
- allow children to use inappropriate language unchallenged
- make sexually suggestive comments about or to a child, even in fun
- let allegations a child makes go unchallenged or unrecorded
- do things of a personal nature for children that they can do themselves
- take photographs of a child without parental consent.

Further precautions

Recruitment

Lancashire West CABx will ensure that sound recruitment practices are in place to ensure that anyone considered to be a risk to children does not enter the CAB service. The following precautions will reduce this risk:

- Anyone applying to work for the bureau should be interviewed and asked to provide two references from former employers.
- If an applicant is unable to provide employer references, they should provide references from a community leader etc.
- Anyone who is selected for interview or to begin training within the bureau will be asked to disclose details of any unspent convictions.
- Thorough induction training must be provided to ensure that staff/volunteers are aware of the service’s core values, confidentiality and best practice.
LANCASHIRE WEST CITIZENS ADVICE BUREAUX

- Staff and volunteers should be given regular supervision and have training needs assessed.

- Regular case checking should be adopted and any unusual or excessive contact with a child recorded.

Regular review of policies and procedures

The bureau’s child protection policies and procedures must be reviewed annually. Necessary changes that are identified in the interim period, as a result of amendment to legislation or local children and families procedures, will be made as required.
## Clients by L. A. ward & part 1 social policy issues

**Bureau:** Lancashire West CAB  
**Outlet:** %  
**Suboutlet:** %  
**Financial Year:** 2011/12  
**Date Run:** 05/09/2012  
**Data Set:** 01/04/2012

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*Appendix 3*
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### WYRE CAB – CLIENT SATISFACTION SURVEY – Q1, 2012-13

#### As a result of their visit to CAB the percentage of clients who gave the following satisfaction indicators:

<table>
<thead>
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<th>Telephone Gateway</th>
<th>Face to Face</th>
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<tr>
<td>88%</td>
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<td>95%</td>
<td>100%</td>
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</table>

- Found it easy or very easy to access the CAB service in Wyre
- Found the information they received from the CAB helpful or very helpful
- Found the advice they received almost or completely resolved their enquiry
- Felt their visit to CAB had had a positive or very positive impact on their life
- Were overall satisfied or very satisfied with the level of service they receive
- Would be likely or certain to recommend CAB to others as a source of help and advice

#### As a result of their visit to CAB the percentage of clients who indicated the following improvements:

<table>
<thead>
<tr>
<th>Telephone Gateway</th>
<th>Face to Face</th>
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<td>56%</td>
<td>94%</td>
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<tr>
<td>44%*</td>
<td>88%</td>
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<tr>
<td>22%*</td>
<td>63% (37% said not applicable)</td>
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<tr>
<td>44%*</td>
<td>69% (31% said not applicable)</td>
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<tr>
<td>45%*</td>
<td>88%</td>
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<tr>
<td>45%*</td>
<td>75%</td>
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</table>

- Confidence
- Peace of mind
- Health and comfort
- Personal relationships
- Knowledge of how things work
- The ability to help themselves

*This question was irrelevant for some telephone clients as it did not relate to their CAB enquiry.*

#### Other Comments:
- Invaluable Service
- More appointments would reduce waiting times
- Very happy with service
- Free gateway telephone number
- Pleased with advice given
- Need more people

Sample: Face to Face – All clients, Telephone Gateway 20 clients.
Lancashire West Citizens Advice Bureaux

Service Overview
Lancashire West Citizens Advice Bureaux (CAB) has an established track record of delivering an accessible and holistic general advice service on a full range of issues.

1 A service that is free at the point of delivery for the client and is independent and confidential

Free service at the point of delivery
All of our services are provided free at the point of delivery.

The aims of the CAB service are:
- To provide the advice people need for the problems they face.
- To improve the policies and practices that affect people’s lives.

We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

2 Endorsed by a quality mark scheme
Quality Mark
We hold the Community Legal Service (CLS) Specialist Quality Mark in Welfare Benefits, Debt and Housing and the General Help Quality Mark in all other categories of law. This was first awarded in 2002 and reconfirmed at audit.

We are accredited to provide level 1 immigration advice by the OISC.

Ongoing quality assurance
We have robust processes in place for ensuring the quality of our service.

Audit process
We are a member of the National Association of Citizens Advice Bureaux (Citizens Advice) adhering to a rigorous Membership Agreement. We are audited every three years to measure compliance with:-
- membership standards;
- the quality marks;
- a quality of advice assessment.

Auditors are accredited to award the CLS General Help Quality Mark, including casework level.

Case record checks
Case records are regularly checked by Casework Supervisors and random Independent File Reviews carried out on 10% of files monthly. During trainee adviser periods, all CASE records are checked daily.
Training and development
Citizens Advice operates a competences scheme to which all volunteers and paid staff must adhere. The competences for an adviser are equivalent to NVQ level 3 and a specialist adviser NVQ level 4. Records are signed off by the Casework Supervisor.

There are regular staff meetings and training sessions, recent examples include training on “Welfare Reform” and “Changes to Child Maintenance”.

Governance/management
Governance is provided through the Trustee Board, trustees are unpaid volunteers who act as directors under company law. The Trustee Board meets five times per year and has provision via Finance and Personnel Sub-Committees to meet on specific issues outside these general meetings. The District Manager, Finance and Personnel Officer and Project Support Officer oversee daily operations.

Client feedback
We monitor service standards through client feedback, for example:-

1. Clients accessing all services are encouraged to complete feedback questionnaires.
2. Client comment and complaint leaflets are prominently displayed in the reception area and in interview rooms.

3 Providing an holistic and client focused approach to advice provision using both staff and volunteers

Holistic approach, which focuses on early intervention

Our service delivery is underpinned by the principle that our advice services are holistic and identify problems at the earliest stage.

All clients accessing our service begin their journey with a Gateway Assessment. This enables us to quickly identify all of the problems they face and deal with them holistically. We interrogate clients’ presenting problems to identify other issues which may also need to be addressed; for example clients presenting with debt problems will be given a welfare benefits eligibility check.

More details of our Gateway Assessment approach are outlined at section 5.

Using this approach we ensure:

- potential problems can be identified early or pre-empted, preventing them escalating into anything more serious;
- there is a huge cost saving to statutory agencies through tackling problems early;
- residents receive the support and help they need at the time and place they need it;
• elderly people are supported to exercise choice and control to live independently;
• families are supported to retain their homes;
• relationship breakdown is often prevented;
• added value to a whole range of other local statutory and voluntary organisations through joint work.

We provide a range of advice and information services covering the following topics:


Debt is the largest advice category followed by welfare benefits, employment and housing in that order. In addition to our extensive range of debt solutions we are approved to offer Debt Relief Orders (DRO). All our specialist debt caseworkers are DRO Authorised Intermediaries.

Client focused approach to advice provision
We maintain a client-focused approach by offering a wide range of services from self-help through to specialist casework. We establish on first contact with clients what they want to achieve, how much help they will need to resolve their problem and how they want to communicate with us.

Our range of services includes:-

• **Reception Services** – Clients are supported to access information, online services and self-help materials

• **Gateway Services** – All clients are helped by qualified gateway assessors to resolve their problems or be able to access the services most appropriate to their needs.

• **Generalist Advice** – Our advisers provide detailed advice, write letters, send e-mails and make phone calls to service providers on behalf of Chorley people to help resolve their problems. Many residents, especially the elderly, find it difficult to contact anyone when things go wrong.

• **Specialist Service** – Clients receive a full casework service for a) very complex issues and/or b) those very vulnerable clients who need enhanced support.

We work in partnership with a range of other organisations, making referrals and providing joined-up services, which ensure that clients get the holistic help they need.
Campaigning on behalf of Residents
An integral part of the holistic service we offer is gathering evidence about the problems residents face. This evidence is used both locally and nationally to influence decision makers and MPs. We have a large body of intelligence in respect of poor as well as good quality services, which is made available to our local authority partners.

Our contributions to local and national campaign work include:

- Big Energy Week – information guides, fact sheets and assistance were provided to residents raising awareness of all the help available to combat fuel poverty and to ensure access to all the available allowances, special tariffs and benefits;
- Surveys for:
  - ‘Housing Voice’ re affordable housing;
  - ‘Difficulty in opening a Bank Account after bankruptcy’;
  - ‘Hardest Hit Christmas Card’ for residents with long term health issues and disabilities;
  - ‘Stop Energy Rip Offs’ - to give residents a fairer deal on energy supplies.
  - ‘Oil Clubs’ - distribution of information guides and “Top Tips for Oil Club Co-ordinators” sent to Council Members and staff, who represent and work with rural communities.

Services delivered through a combination of paid and volunteer staff.
We have an average of 50 to 70 volunteer roles at any one time. We also have 23 paid members of staff. All our staff are supported, supervised and accredited through quality assurance procedures.

Both paid and volunteer staff access internal and external training throughout their time with Lancashire West CAB. Each member of staff has an annual training plan, which is monitored by their line manager. Many of our courses carry CPD hours and ensure all staff develop the requisite skills in order to delivery a quality-accredited service.

Volunteering at Lancashire West CAB
We offer volunteering opportunities to local people, allowing them to benefit from support and free training leading to accredited qualifications, which along with the experience of volunteering itself, helps them develop skills for life beyond CAB. Our volunteers get free training, ongoing support and paid expenses.

The training course to become an adviser is approximately 240 hours and teaches valuable skills to the individual – in terms of advising clients and understanding people’s rights and the law, IT literacy, negotiation, and communication.
There are opportunities for volunteers to undertake a number of roles at Lancashire West CAB:

- receptionist;
- gateway support;
- gateway assessor;
- generalist adviser;
- administrator
- trustee

Benefits of volunteering
We support, embrace and want to play a key part in bringing the community service delivery through volunteering to our local authority areas. We are a locally based community organisation, with local people running, governing and using our services. Volunteering offers significant benefits to both the individual and the wider community.

- In 2011/12 - 30% of our volunteers left to go into paid employment. The skills and confidence gained through training and advising increases the employability of local people.
- Our volunteers have cited a range of positive effects they experience from volunteering with us - a sense of purpose and achievement; rewarding and interesting; increasing confidence; and learning new skills.
- Law students who train with us as CAB advisers can get up to six months off their solicitor training contracts.
- Volunteering improves social inclusion and community cohesion, encourages generational integration and leads to stronger communities

4 Delivering the service within the local community

Lancashire West CAB was established in September 1976 and has provided advice and information services from a convenient town centre location since its inception. We provide the following services from our various locations

- Open door manned reception service available 5 days per week;
- Access to on-line information tools such as Adviceguide;
- Dedicated support for on-line users;
- Face to face gateway service for problem diagnosis and next step provision;
- Generalist level advice appointments;
- Outreach services throughout the community;
- Open access to a gateway telephone advice line – 5 days per week;
- Access to a specialist level casework service for debt, housing and welfare benefits, funded through government and trust contracts available 5-days per week.
5 Delivering the service through a telephone gateway, a face to face gateway and pre-bookable appointments for clients who need them

Lancashire West CAB Gateway Assessment Service
Access to our advice service begins with a Gateway Assessment, either face to face or by telephone. Gateway Assessments:
• ensure information is readily available to those who are able to use it to resolve their own problems
• undertake a time limited assessment of the presenting problems in order that the next steps which needs to be taken can be determined
• make an appointment for further advice or casework with a CAB adviser or on referral to another agency.

Clients’ Journey through Gateway Assessment
Clients are assessed and their problems diagnosed by qualified Gateway Assessors in a short (15 – 20 minute interview) to access help and support appropriate to their needs in the following ways:

Those people who can resolve their own problems are provided with:
• access to quality-assured information and/or self-help material
• a better understanding of the extent of their problem
• support in accessing information and self-help materials
• key elements of information are identified and/or highlighted (assisted information).

Those people who are able to resolve their own problems, but need enhanced support are given:
• an appointment with a generalist adviser for detailed advice, exploration and explanation of options available or a brief intervention on their behalf.

Those people, in greatest need or with complex problems, who at a particular point in their lives require a skilled adviser to act on their behalf, are given an active referral for:
• an appointment with a specialist adviser.

The diagram below outlines the process:-
6 Work in partnership with a range of partners, ensuring the best service for clients

Partnerships and Joint Working
For over 35 years Lancashire West CAB has been a widely recognised high street brand and a key agency in helping people and communities to solve an enormous range of problems and challenges.

Our experience throughout these years has shown us that local people need integrated provision of services by a range of providers, which gives choice but avoids duplication. We believe a mixed economy of provision through effective partnership working is essential.

We have links with most local voluntary, community and faith sector organisations as well as private and statutory sector services. We have robust referral protocols, and regular liaison meetings to ensure our services meet the needs of our users. We have joint referral protocols in place with a host of partner organisations such as:-

Local Authorities, RSLs, local GPs, Lancashire Care NHS Foundation Trust, LCC Social Services, DISC, Probation Services, Homestart, Bereavement Advice Services, Maternity Action, Working Families, Turn2Us, AgeUK, Help

We work closely with statutory agencies on claims for housing and council tax benefits, homelessness applications, family and care issues, rogue traders/enforcement actions, tax and benefit issues, business start-up, elderly care support.

Many of our Trustees and staff also support other local groups through volunteering and trusteeship.

Funding relationships
As an independent charity and local business we consistently bring in external funding. This is made possible by the strong core funding base, giving us a platform to lever in this additional income.

A sample of our existing contracts for the provision of dedicated services:
- Legal Services Commission for specialist debt, housing & welfare benefits casework for eligible legal aid clients.
- MAS (thro’ Citizens Advice) for specialist Face2Face debt casework
- Royal British Legion (thro’ Citizens Advice) for specialist debt and welfare benefits casework for those with military connections.
- Lloyds TSB Foundation for England and Wales – money management training.
- Safer Lancashire Board – Independent Domestic Violence Advisers

We also have funding relationships with the following Local Authorities:
- Chorley Borough Council
- South Ribble Borough Council
- West Lancashire Borough Council
- Wyre Borough Council

7 Delivering a service that is responsive to the needs of the community and offers bespoke solutions to any barriers of access to service

Services responsive to the community needs
We use our extensive local knowledge to ensure that the services we provide are right for our clients. We collect significant data relating to our clients and their advice needs. Our detailed case recording system (CASE) generates valuable insights into local problems, trends, and service needs.
What are our client’s problems?

Debt and Benefit Problems

Financial problems continue for households who have suffered reduced income and consequent debts, following lost or reduced employment – the proportion of our clients in full-time employment continues to fall. Job seekers allowance advice is now once again increasing after a lull. Drops in real household income may trigger further increases in debt problems.

A selection of the areas our clients are currently seeking help with are - Employment and Support Allowance, being migrated from disability benefits, benefit appeals, problems with Payday Loans, fuel poverty and bad lending practices.

Many of our clients are also now seeking advice on the changes being proposed under the Welfare Reform Bill and we expect an increase in benefits enquiries in the coming year as these changes, outlined below, significantly impact our clients.

- Universal Credit to integrate means-tested working age benefits and tax credits;
- Disability Living Allowance replaced with Personal Independence Payments;
- Cap on total household benefits;
- Uprising of benefits and tax credits by Consumer Prices Index;
- Contribution-based Employment and Support Allowance (ESA) for those in work-related activity group limited to 12 months;
- ESA cut for young people who haven’t paid NI;
- Housing Benefit cuts where social housing tenants are under-occupying;
- Changes to discretionary social fund payments.

Recession-related employment problems

There are some indications of recession-related employment problems reversing previous downward trends:

- Dismissal advice peaked at the same time as redundancy but remained at a relatively high level. It is now at its highest level for two years.
- Job seekers allowance advice to new or existing claimants now equals the seasonal peaks of 2010/11 and 2009/10.
- We are now seeing the number of clients who are employed on a part-time rather than full-time basis increasing.

Research shows a direct correlation between poverty and ill health and this is
reflected in many of the clients we help. Access to high quality assured advice, information, support and assistance with knowledge of their rights and responsibilities allows beneficiaries to make informed decisions and an ability to deal with their own problems projecting a healthier and more active community and generating a more positive approach to every day life.

Regular meetings are held with partners/community groups to determine views, exchange ideas and determine good working practices and regular feedback is sought from beneficiaries on issues including access to service, quality of advice and effectiveness of advice.

Using this intelligence in our annual planning process, we ensure Lancashire West CAB targets its services towards those most likely to be socially excluded. We are known and trusted by some of the most vulnerable people in the community.

Removing the Barriers – Bespoke Solutions
We are committed to improving service quality by consolidating the position of the existing “core” bureaux, which are on the high street, fully DDA compliant, and easily reached by public transport. We provide access to translators, language line, BSL and are able to arrange home visits through our project work. At the same time we are looking to improve accessibility by developing a supported network of extensions and outreach projects.

Feedback from our stakeholders shows there is a real need for community outreach and out of hours provision. Many people find the cost of travel prohibitive, but they still need access to quality advice and information, which could be provided in their own locality and outside office hours. Equally not everyone needs full face-to-face advice and, with support, would be able to resolve their problems without having to access the main bureau premises.

“Access for All” activity in the community - We have entered into a dialogue with existing and potential service users to ensure that this process is responsive to real demand. We aim to develop new projects to promote the concept of ‘access for all’ to target individuals and communities, where access to services is an issue.

An example of our “access for all” work is the partnership with local community groups to embed CAB service delivery into community venues. This will enable community groups to support local users to access on-line Adviceguide, first tier CAB information services and make referral for more complex needs. These services will be accessible out of normal office hours.

“Access for All” through Telephone Advice Line – Consistent monitoring of our telephone advice line showed there was more demand than we could manage. We, therefore, took the decision to expand this service. We currently have between 8-10 volunteers working 9-5 each day throughout the week, with some coming in everyday. We consistently recruit to this service as it attracts many students and those looking for work, who either return to
study or obtain employment. We are dedicating training time to ensure they are able to take calls within a few months.

“Access for All” On-line Advice through Adviceguide – Many people want the convenience of finding web-based help and solutions to their problems. With an internet connection clients can access Adviceguide, which is the CAB on-line information system. Clients are given basic information to provide self-help solutions to problems. They can download factsheets for future reference and are signposted to their local CAB if they need further help.

We provide access to Adviceguide in our reception areas and have dedicated support staff if clients need help to navigate the system. We are also currently working in partnership with community groups to make Adviceguide accessible to many more local residents.

Employment is the second biggest category for Adviceguide after benefit, whilst debt predominates alongside benefit in the problems of individual clients helped by bureaux. It’s clear that the different methods of access attract some very different types of client. Access to a bureau, particularly for those in employment, can be a difficult. Equally important is access to the internet and the ability to use the information provided, set against the need of some clients for one-to-one help. Debt is often a particularly complex set of problems for which individuals require skilled help, which is reflected in its relatively smaller share on Adviceguide.

Adviceguide is open to everyone for private use, accessed through the internet. For those accessing Adviceguide with assistance and support in public use community venues, we will have confidential referral mechanisms in place to ensure those with complex problems are able to access the service most appropriate to their needs, such as an appointment with a generalist or specialist adviser.

8 Robust feedback and customer satisfaction mechanisms

Client satisfaction surveys
We ask all of our face-to-face gateway, generalist advice and specialist casework clients for feedback on our services. We random sample telephone gateway clients for feedback.

Complaint Handling
Alongside our satisfaction surveys, we have a formal complaints process. Complaints about our services can be raised by letter, email or phone call. Details of how to make a complaint are displayed in reception areas, all interview rooms and explained to telephone callers.
Client comments, feedback and complaints are raised with the Trustee Board/other stakeholders and fed into the organisation’s strategic delivery plans.

For example due to funding restrictions we were no longer able to deliver a service through outreach at health venues in a couple of our local authority areas, which created negative feedback, particularly from those with psychological or physical access difficulties, their carers and supporting groups. Alternative external funding has been sought to ensure the continued availability of CAB services to these vulnerable groups.

The process is detailed in the diagram below.

**Complaints procedure for clients of the CAB service**

- An expression of dissatisfaction is made. Can this be resolved informally?
  - **YES** Problem resolved, record briefly.
  - **NO** Formal complaints procedure instigated
    - **Stage 1** Is the complaint against the bureau manager? Yes - go to next stage. No - Bureau Manager acknowledges receipt of complaint in 5 working days. The complaint is reviewed, & a response sent to the complainant within 20 working days.
    - **Stage 2** If still unresolved, the Chair of the Management Committee reviews the complaint, making sure all relevant information has been taken into account. The Chair acknowledges receipt of the complaint within 5 working days, and gives a full response to the complainant within 20 working days.
    - **Stage 3** If unresolved, review under the guidance of the Chief Executive. All case files should be forwarded to the Chief Executive at this point. The Chief Executive will acknowledge receipt of the complaint within 5 working days and will provide a full response to both the client and the bureau within 20 working days.
    - **Stage 4** The Independent Adjudicator. The decision of the Adjudicator is final, and can only take into account the handling not the substance of the complaint. Copy of review sent to the bureau.
9 Delivering the outputs
All clients receiving advice across all projects are recorded on the Citizens Advice case management database, CASE, which has been operated by us since 2003.

Through CASE we collect client information relating to:-
- postcode, age, gender, ethnicity, disability, income, housing status, employment status, household type, martial status, dependents, caring responsibilities, literacy

CASE also records details of the client’s issue, the work undertaken on their behalf and for specialist services outcomes data for the client, including income gains.

CASE enables us to:-
Monitor clients’ trends and identify emerging needs - by for example, monitoring trends across different service locations and planning our service delivery to best meet the needs of clients.
Measure progress against key performance indicators – by ongoing monitoring of data to ensure performance and services delivered meet the required targets.
Submit data for social policy work - We currently have a range of scheduled reporting with projects funders, for example:-
- The Royal British Legion - Monthly reporting of statistical data capturing such things as clients numbers, financial outcomes, breakdown of military type, enquiry outcomes, waiting times, case closure times.
- Face2Face Debt Advice - Quarterly reporting of data capturing management activities, changes to debt advice provision, delivery methods and challenges, waiting times, innovation and good practice, social policy, promotional activities, staffing issues, caseworker training, case studies and other significant issues.
Project performance summary for Chorley Citizens Advice Bureau from Jan 2011 to Dec 2011

Monthly new clients seen

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>New performance year total</td>
<td>98</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

Last 4 quarters % performance for new clients seen

<table>
<thead>
<tr>
<th></th>
<th>Jan 11 - Mar 11</th>
<th>Apr 11 - Jun 11</th>
<th>Jul 11 - Sep 11</th>
<th>Oct 11 - Dec 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>% performance</td>
<td>113%</td>
<td>104%</td>
<td>103%</td>
<td>109%</td>
</tr>
<tr>
<td></td>
<td>Over performing</td>
<td>Over performing</td>
<td>Over performing</td>
<td>Over performing</td>
</tr>
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</table>

Quarterly financial outcomes

<table>
<thead>
<tr>
<th></th>
<th>Jan 11 - Mar 11</th>
<th>Apr 11 - Jun 11</th>
<th>Jul 11 - Sep 11</th>
<th>Oct 11 - Dec 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debt written off</td>
<td>£462,150</td>
<td>£636,823</td>
<td>£442,145</td>
<td>£330,999</td>
</tr>
<tr>
<td>Benefits claimed</td>
<td>£143,240</td>
<td>£84,220</td>
<td>£109,277</td>
<td>£88,793</td>
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<tr>
<td>Legion grants</td>
<td>£4,546</td>
<td>£20,942</td>
<td>£11,838</td>
<td>£19,115</td>
</tr>
<tr>
<td>Other grants and gains</td>
<td>£155</td>
<td>£200</td>
<td>£82</td>
<td>£19,815</td>
</tr>
<tr>
<td>% of target*</td>
<td>1130%</td>
<td>1374%</td>
<td>1043%</td>
<td>425%</td>
</tr>
</tbody>
</table>

*Target for 10/11 = clients seen in quarter x £600; target for 11/12 = clients seen in quarter x £1,200

Quarterly actual vs target for new clients seen

<table>
<thead>
<tr>
<th></th>
<th>Jan 11 - Mar 11</th>
<th>Apr 11 - Jun 11</th>
<th>Jul 11 - Sep 11</th>
<th>Oct 11 - Dec 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chorley</td>
<td>102</td>
<td>94</td>
<td>93</td>
<td>98</td>
</tr>
<tr>
<td>Target*</td>
<td>90</td>
<td>90</td>
<td>90</td>
<td>90</td>
</tr>
</tbody>
</table>

Quarterly actual vs target for total financial outcomes

<table>
<thead>
<tr>
<th></th>
<th>Jan 11 - Mar 11</th>
<th>Apr 11 - Jun 11</th>
<th>Jul 11 - Sep 11</th>
<th>Oct 11 - Dec 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chorley</td>
<td>£610,091</td>
<td>£742,185</td>
<td>£563,343</td>
<td>£458,722</td>
</tr>
<tr>
<td>Target*</td>
<td>£54,000</td>
<td>£54,000</td>
<td>£54,000</td>
<td>£108,000</td>
</tr>
</tbody>
</table>

Further breakdown of data between Oct 2011 and Dec 2011

- Clients referred by TRBL this quarter: 31
- Clients referred by TRBL this year: 31
- Number of unique clients seen this year: 90
- Unique clients this year which were from TRBL: 34%
- Enquiries currently open: 109
- Avg duration of enquiries: 128 days
- Average time to see new clients: 10 days
- Percent of clients with eligibility details on file: 97%
- Percent of clients with project data protection permission: 100%
League Table of Bureaux Participating in the BMA Project from Oct 2011 to Dec 2011

Top 10 performers across all participating bureaux

### Current quarter (Oct 11 - Dec 11)

<table>
<thead>
<tr>
<th>Bureau ID</th>
<th>% of target new clients seen</th>
<th>Debt written off</th>
<th>Benefit claimed</th>
<th>Legion grants</th>
<th>Other grants &amp; gains</th>
</tr>
</thead>
<tbody>
<tr>
<td>238</td>
<td>149%</td>
<td>£4,102</td>
<td>£578</td>
<td>£10,111</td>
<td>£10,111</td>
</tr>
<tr>
<td>824</td>
<td>148%</td>
<td>£43,661</td>
<td>£110,470</td>
<td>£6,271</td>
<td>£6,271</td>
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<tr>
<td>283</td>
<td>138%</td>
<td>£266,301</td>
<td>£28,615</td>
<td>£6,404</td>
<td>£6,404</td>
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<tr>
<td>390</td>
<td>135%</td>
<td>£196,386</td>
<td>£51,290</td>
<td>£10,408</td>
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<tr>
<td>187</td>
<td>133%</td>
<td>£14,450</td>
<td>£38,136</td>
<td>£38,425</td>
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<tr>
<td>318</td>
<td>129%</td>
<td>£263,965</td>
<td>£42,852</td>
<td>£0</td>
<td>£0</td>
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<tr>
<td>265</td>
<td>129%</td>
<td>£28,535</td>
<td>£48,093</td>
<td>£12,081</td>
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</tr>
<tr>
<td>652</td>
<td>124%</td>
<td>£53,876</td>
<td>£52,786</td>
<td>£10,706</td>
<td>£10,706</td>
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<tr>
<td>926</td>
<td>122%</td>
<td>£45,539</td>
<td>£64,757</td>
<td>£9,494</td>
<td>£9,494</td>
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<tr>
<td>761</td>
<td>122%</td>
<td>£25,143</td>
<td>£37,102</td>
<td>£5,446</td>
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</table>

### Year to date (Oct 11 - Dec 11)

<table>
<thead>
<tr>
<th>Bureau ID</th>
<th>% of target new clients seen</th>
<th>Total financial outcomes</th>
<th>% of total clients referred by the Legion</th>
<th>Average client waiting time</th>
<th>Average enquiry duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>238</td>
<td>149%</td>
<td>£24,943</td>
<td>67%</td>
<td>8 days</td>
<td>79 days</td>
</tr>
<tr>
<td>824</td>
<td>148%</td>
<td>£176,367</td>
<td>63%</td>
<td>N/A days</td>
<td>46 days</td>
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<tr>
<td>283</td>
<td>138%</td>
<td>£310,149</td>
<td>32%</td>
<td>11 days</td>
<td>104 days</td>
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<tr>
<td>390</td>
<td>135%</td>
<td>£275,539</td>
<td>40%</td>
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<td>120 days</td>
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<td>187</td>
<td>133%</td>
<td>£143,809</td>
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<td>318</td>
<td>129%</td>
<td>£314,977</td>
<td>73%</td>
<td>N/A days</td>
<td>62 days</td>
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<td>265</td>
<td>129%</td>
<td>£112,539</td>
<td>62%</td>
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<td>38%</td>
<td>1 days</td>
<td>66 days</td>
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<tr>
<td>926</td>
<td>122%</td>
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<td>104%</td>
<td>13 days</td>
<td>78 days</td>
</tr>
<tr>
<td>761</td>
<td>122%</td>
<td>£116,099</td>
<td>48%</td>
<td>4 days</td>
<td>42 days</td>
</tr>
</tbody>
</table>

### National Total

- £5,351,566
- £1,348,520
- £373,055
- £562,194

### Chorley

- % of target new clients seen: 109%
- Total financial outcomes: £330,999
- National Average: 105%
- £38,793
- £19,115
- £19,815

### National Average

- % of target new clients seen: 105%
- Total financial outcomes: £233,036
- £35,487
- £9,817
- £14,795

### Last 4 quarters % of target clients seen

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Chorley</th>
<th>National Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 11 - Mar 11</td>
<td>113%</td>
<td>127%</td>
</tr>
<tr>
<td>Apr 11 - Jun 11</td>
<td>104%</td>
<td>114%</td>
</tr>
<tr>
<td>Jul 11 - Sep 11</td>
<td>103%</td>
<td>115%</td>
</tr>
<tr>
<td>Oct 11 - Dec 11</td>
<td>109%</td>
<td>105%</td>
</tr>
</tbody>
</table>

### Last 4 quarters total financial outcomes

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Thousands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 11 - Mar 11</td>
<td>£610,091</td>
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<tr>
<td>Apr 11 - Jun 11</td>
<td>£742,185</td>
</tr>
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<td>Jul 11 - Sep 11</td>
<td>£563,343</td>
</tr>
<tr>
<td>Oct 11 - Dec 11</td>
<td>£458,722</td>
</tr>
</tbody>
</table>
Quarterly actual vs target for new clients seen

Chorley
102 94 93 98
Target
90 90 90 90

Quarterly actual vs target for total financial outcomes

Chorley £610,091 £742,185 £563,343 £458,722
Target £54,000 £54,000 £54,000 £108,000

Last 4 Quarters % of Target Clients Seen

Chorley 113% 104% 103% 109%
National Average 127% 114% 115% 105%

Last 4 Quarters Total Financial Outcomes

Chorley £610,091 £742,185 £563,343 £458,722
National Average £233,036 £194,320 £203,981 £200,930