

Sevenoaks Citizens Advice Bureau

Annual Report 2007—2008



the charity for
your community



Free Confidential Impartial Independent

Chairman's Annual Review of 2007

This is my fourth Annual Report for the Sevenoaks Bureau. Overall we have had a successful year. We have been particularly pleased that Holly Hearle has settled in so well as our manager. The bureau has functioned smoothly under Holly's leadership with progress on a number of fronts. But we are also having to face some difficulties in the environment in which we operate.

Finance for the bureau has always been a problem. We are so grateful for the ongoing support from Sevenoaks District Council who continue to award a Grant covering some 50% of our operating costs. But The District Council have their own problems in the financial arena and we are on notice that our Grant will be reduced in future years. We are therefore having to prioritise our fundraising activities and we are in the process of establishing the 'Friends of Sevenoaks CAB'. Our aim is to find residents in Sevenoaks who will donate an regular annual sum to help us to survive. A small committee has been established, supported by Janet Cooper and Maggie Laidlaw, and masterminded by Cheryl Bell. Results are encouraging so far, but we need more support, so we intend to embark on a similar programme with local businesses. Frankly if these initiatives do not succeed, then our Bureau is at risk.

We continue to find new volunteer advisers. Susie Stripp works hard to bring the new advisers up to speed and has made great progress, and Gill Clayton and Pat McGregor ensure that the operational and administrative activities run smoothly in the office.

On the wider front, the world of CAB's is changing. We are now in competition with private sector organisations, particularly in the debt and benefits fields, which have different motivation and funding. We are therefore trying to work more closely with our neighbouring Bureaux to see if we can find economies of scale and identify best practice. And we need to work harder to find a more efficient way of using the telephone to help deal with clients more effectively.

We are working towards incorporation. This will remove the personal liability for our existing Trustees which carries some risk in this complicated world. We hope to have the Corporate Status and Board ready for the Autumn.

Finally a thank you to Peter Symes who stood down as a Trustee having served for many years, and particularly to Andrew Davies who has served us as Treasurer so well throughout the last eight years.
David Small

People and Service

The year began with the arrival as Bureau Manager of Holly Hearle, who was a volunteer at the bureau for some years and latterly a debt adviser, before doing a short contract at Citizens Advice in London, in the Information Department. Holly took over from Gill Clayton, whose able stewardship over the previous six months was greatly appreciated by all the staff, volunteers and trustees.

During the year, three advisers left the bureau. Gerry Pudney took up a paid post within Citizens Advice, and Katrina Welton left to pursue other interests. Jane Worrell also gave up advising, having taken up a paid post with the Sevenoaks Volunteer Bureau, but she continues to provide back-up cover for form filling in people's homes, a service which is much appreciated.

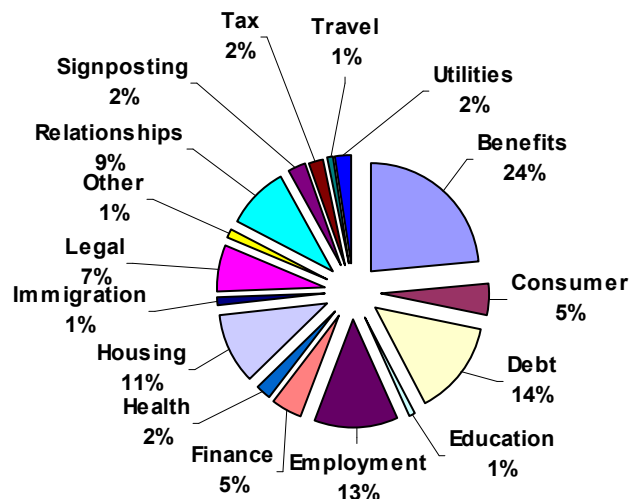
Seven trainees joined the bureau, of which all are still progressing well towards becoming advisers. Four people completed their training, Linda Glennie, Mavis Maundrell, Rachel Laughton-Scott and Emma Matson, and a further three, who joined in 2006-7, are due to complete training shortly. At the same time, we were also joined by two volunteer administrative assistants, Helen Rashbrook and Ruth Bland, who help with the day to day paperwork of the bureau. Many bureaux struggle to acquire and retain volunteers, but Sevenoaks CAB remains in a very fortunate position, in that we have more volunteers offering to join the bureau than we have facilities to train them. The Trustees and staff of the bureau are hugely grateful to the volunteers who offer their time freely to support the work of the CAB, and who bring a wide range of professional and life experience to the role of advising clients.

In addition to the regular hours which have been operating since 2004, the bureau began a pilot scheme in September 2007, to make our facilities more available to people who work full-time, and clients can now be seen by appointment, from 3.30 to 7.00 on Thursdays. The pilot was very successful, and Thursday evening sessions have now been incorporated into our regular timetable, and tie in very well with the Solicitors' Rota that already operated on Thursday evenings. The bureau greatly values the work of the regular bank of local solicitors who provide free legal advice for us, and appreciate their commitment to the CAB ethos of free advice

Clients continue to be very pleased with our service overall. Our client satisfaction survey this year collected information about ease of access to our service.

- 93% of respondents were happy or very happy with our service
- 96% were happy or very happy with our opening times
- 94% were happy or very happy with the time they had to wait to be seen
- 98% were happy or very happy with the service they were given
- 99% would recommend the service to others.

Issues Raised - 2007/8

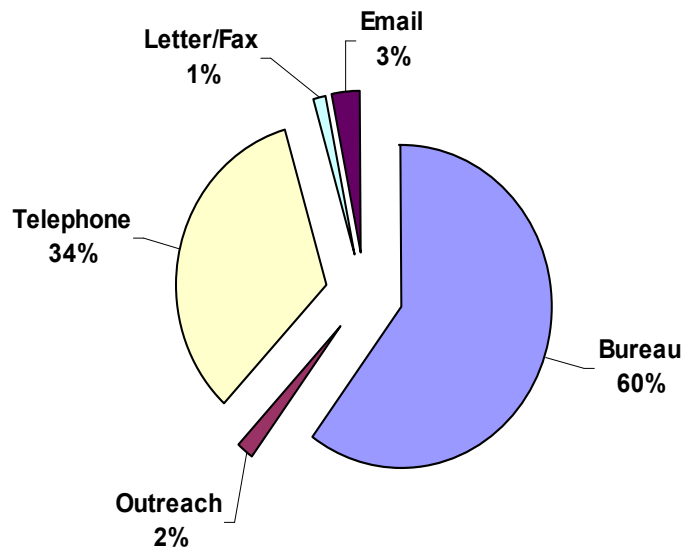


Some achievements

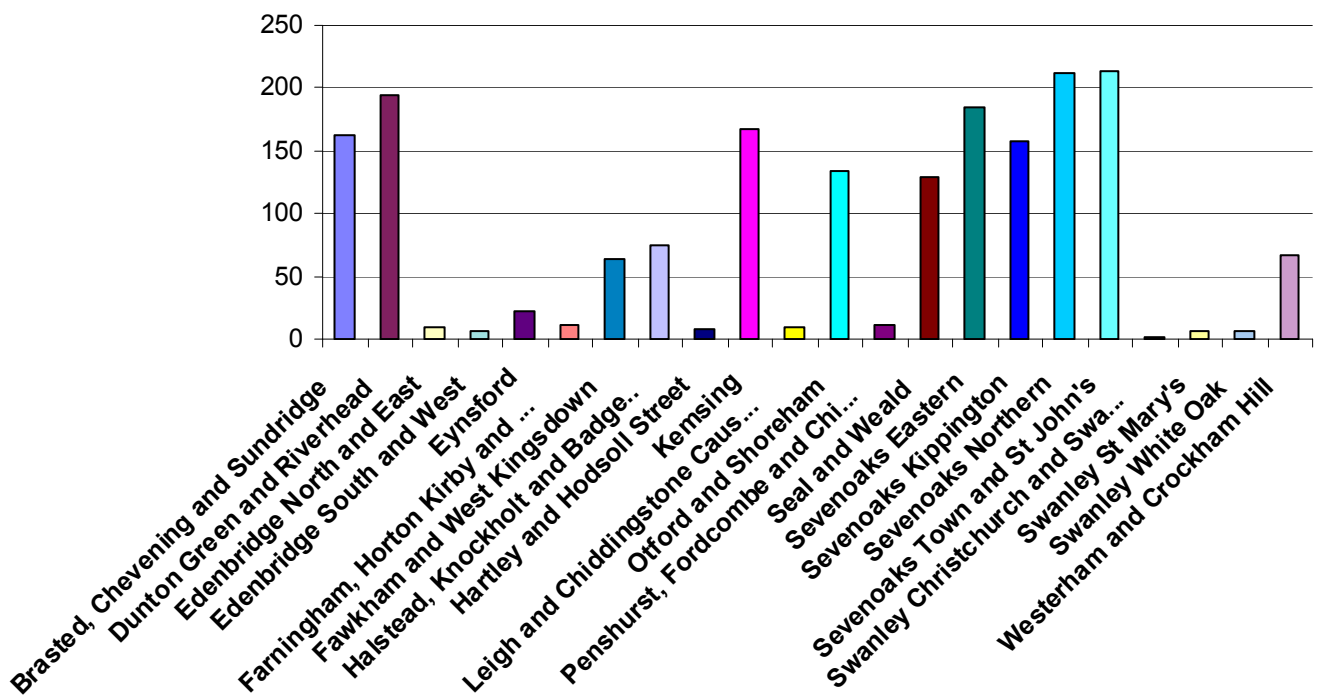
- Thursday evening opening achieved without any extra cost
- Outreach established in Kemsing and Sundridge by appointment
- Access to specialist casework arranged in debt, employment, housing, domestic violence and benefits via collaboration with Tunbridge Wells and Maidstone CABs.
- Volunteer qualified to provide representation at welfare benefits cases
- Joined KAMCA—the Kent & Medway Citizens Advice group, which is a platform for county-wide bidding for grants and project work
- 40 clients seen by the Duty solicitor
- 5 clients helped to win at employment tribunals with an average gain of £3100
- 11 clients were successfully assisted with welfare benefits appeals or to recover money the benefits agencies had stopped in error.
- Since October, when we started recording outcomes, clients have directly informed us about £72,000 worth of financial gain, as a result of their visits to the CAB. We believe the true figure is well in excess of this, as most clients do not let us know what happens after they visit us.
- We had 35 active debt clients, with total debts of £506,329.
- We worked with West Kent PCT to highlight the problem of the lack of NHS dentists in the

Statistics

Method of Client Contact - 2007/8



Clients 2007-2008



Funding - past and future

The funding situation remains extremely tight. We were very fortunate to be made the charity of the year by Wilderness Golf Club, which made £12,000 for the CAB, for which we are most grateful, and with the ongoing grant from DEFRA for rural advice work and a number of generous individual and institutional grants, the bureau actually finished they financial year in a better position than it began.

We have been fortunate this year is being awarded a number of capital grants from local organisations which have allowed us to update the waiting room and one of the interview rooms, as well as ensuring that our computer equipment, without which we could not function, is fit for purpose. This means that the fabric and functionality of the CAB's facilities is assured for at least two years, with the exception of the boiler, which needs to be replaced shortly, and for which we will be fundraising in the next financial year.

However, the outlook going forward is less rosy. The DEFRA project has now been completed and the loss of the £10,200 grant it brought in regularly will cause a substantial reduction in our guaranteed funding for the next financial year. Along with the likelihood that Sevenoaks District Council funding will be reduced in future years, there is considerable financial pressure building up. To this end, we have produced a multi-stranded fundraising strategy which we hope will provide a degree of financial security in what is becoming a steadily more challenging environment for local charities.

Where to next?

With the national economic outlook being much less positive than in recent years, it is very likely that our current main areas of work, welfare benefits, debt, employment and housing, will increase in more demanding economic conditions. At the same time, our main funder, Sevenoaks District Council, is under pressure to reduce its own expenditure, and this will further force the CAB to look for alternative sources of funding. There is no doubt that ensuring the ongoing financial health of the organisation will be the top priority for the coming year.

We also intend to extend our links with neighbouring bureaux via the Legal Service commission sponsored casework offered by Tunbridge Wells and Maidstone CABx, which will greatly enhance the depth of advice that the bureau can offer, and which is vital in an area of the country where solicitors who are prepared to undertake legal aid work are very hard to find. At the same time, the recently formed forum of bureaux in West Kent is already reaping rewards, in terms of join fundraising and collaboration on resources.

Further initiatives are under way to improve our telephone advice service, and to reduce the number of clients who fail to get through to the bureau at the first attempt. While our record on telephone advice compares very well with CABx nationally, we hope that a joint venture with Edenbridge, Swanley and other local CABx will make it easier for those clients who cannot visit the bureau to contact us.

We look forward to a challenging and eventful year ahead.

STATEMENT OF FINANCIAL ACTIVITIES (unapproved)

For the 12 months ended

31 March 2008

	Unrestricted funds		Restricted Funds	Total 2007/8	Budget	2006/07
	General	Designated				
	£	£	£	£	£	£
INCOMING RESOURCES						
Grant	50,820	0	0	50,820	50,820	50,450
Donations	10,263	0	4,292	14,555	10,000	18,487
Fund raising activities	13,320	0	0	13,320	1,700	1,728
Interest	3,082	0	0	3,082	2,800	2,954
Other income	906	0	18,000	18,906	14,000	15,344
Total Incoming Resources	78,391	0	22,292	100,683	79,320	88,963
RESOURCES EXPENDED						
Salaries and NIC	47,651	0	13,747	61,398	58,000	55,576
Pensions	4,586	0	1,323	5,909	5,700	5,048
Advertising for staff	0	0	0	0	0	580
Staff travelling expenses	216	0	62	278	100	94
Volunteers travelling ex- penses	1,454	0	419	1,873	2,100	2,058
Rent	1,770	0	511	2,281	2,250	2,250
Rates and water	393	0	113	506	500	469
Heat & light	424	0	122	546	1,500	313
Cleaning	1,000	0	288	1,288	1,100	1,090
Insurance	1,132	0	327	1,459	1,500	1,443
Equipment and maintenance	597	1,526	1,422	3,545	2,650	383
Computer maintenance	51	415	1,991	2,457	1,000	2,678
Telephone	2,246	0	1,092	3,338	3,100	2,992
Postage	445	0	128	573	700	691
Stationery, printing and pub- licity	1,273	0	2,264	3,537	1,700	1,654
Publications and training	1,002	0	289	1,291	1,600	1,574
Citizens Advice Information Service	1,845	0	532	2,377	2,200	2,070
Conferences and CA AGM	218	0	63	281	0	0
Bank charges	78	0	23	101	0	0
Sundry expenses	1,550	0	447	1,997	750	1,965
Premises maintenance	160	452	46	658	500	9,774
Total Resources Expended	68,089	2,393	25,211	95,693	86,950	92,702
Net Incoming Resources for the Year	10,302	(2,393)	(2,919)	4,990	(7,630)	(3,739)
Transfers				0	0	0
	4,990	0	0	4,990		(3,739)
Transfers	(2,000)	2,000	0	0	0	0
Fund balances brought forward	8,302	(393)	(2,919)	4,990	(7,630)	(3,739)
	27,234	6,048	7,106	40,388	40,388	44,127
Fund balances carried forward	35,536	5,655	4,187	45,378	32,758	40,388

THE AIMS OF THE SERVICE

Sevenoaks CAB aims to help people resolve their legal, money and other problems by providing free, independent and confidential advice and by influencing policymakers.

It is an independent registered charity, reliant on trained volunteers and funds to provide these vital service for the local community.

Management Committee

Elected Members

David Small (Chair)
John Purdie (Treasurer)
Pat McGregor (Secretary)
Amanda Carpenter
David Cooper
Chris Hugo
Ted Irving
Alison James
Martin Wells

Bureau Staff

Holly Hearle (Manager)
Gill Clayton (Deputy Manager)
Susie Stripp (Deputy Manager/Training)
Pat McGregor (Admin Assistant)

Adviser Members

Kate Britten
Carol Bampton

Representative Members

Cllr Avril Hunter
Cllr. Michelle Lowe
Gwyneth Brearley
Pat Downing
Keith Johnson/Hazel
Chiswell
Robert Piper

District Council
District Council
Soroptimists
SDAMH
West Kent Bench
Town Council

Solicitors' Rota Representatives from:

Baker MacDonald
Evans Main
Pendrigh Makin
Knocker & Foskett
Powell & Co
The Reece-Jones Partnership
Walker & Walker
Warners

Advisers

Wilf Allen
Jane Bamfield
Carol Bampton
Anne Beasley *
Kate Britten
Roz Burns
Belinda Copple
Bob Carpenter *

Brenda Cross *
Adele Daniskova *
Linda Fraser
Jane Giffin
Linda Glennie *
Sian Hiller
Lesley Knight
Rachell Laughton-Scott

Fiona Leathers
Emma Matson *
Mavis Maundrell
Susan Parker
Gerry Pudney
Penny Pye
Aldyth Rowe
Arthur Rucker

Chris Sellers *
Celia Smith
Charlotte Snyder *
Chris Thompson *
Vincent Tilley *
Keith Turner *
Margaret Watts
Katrina Welton
Jane Worrell

* in training

Admin. Staff

David Cooper
Susanna Miles
Barry Page
Helen Rashbrook
Ruth Bland

Form Fillers

Heather Barbour
Mary Daniel
Michael Spencer

Fundraising Volunteers

Colin Fleetwood
Anne Fleetwood
Linda di Cara
Cheryl Bell

Left during the year

Andrew Davies
Peter Symes
Gerry Pudney
Katrina Welton
Jane Worell

The Trustees, Management and staff would like to thank the individuals and organisations who have assisted and supported the bureau during the year

Sevenoaks District Council	Universal Music
DEFRA	P Downing
Sevenoaks Town Council	A mystery doner
EDF	Oxford
John London, Kent County Council	Halstead
Sevenoaks Round Table	Sundridge
Shred IT	Shoreham
Julia Hands	Riverhead
Arthur Rucker	Knockholt
Sevenoaks Soroptomists	Chevening

Also all the solicitors who participated in the solicitors' rota

Opening Times

Monday, Tuesday, Thursday and Friday

9.30am – 3.30pm

Thursday 3.30-7.00 by appointment

Outreach at Oxford Parish Rooms on the 1st Tuesday of each month, and at Kemsing and Sundridge Primary Schools by appointment

Form Filling by appointment

The bureau is accessible by wheelchair. A loop system is available for deaf clients in the bureau on request.

Our rota solicitor is available by appointment every other Thursday between 6pm and 7pm.

Please contact the bureau for appointments on 01732 454443.

Additionally, the bureau

- offers home visits by appointment for the housebound and elderly.
- offers specialist advice on debt, housing, employment, domestic violence and welfare benefits (including appeals) issues for people who qualify for legal aid
- welcomes comments on its service whether good or bad. We have notices through out the bureau informing clients how we handle problems and this procedure is included in standard letters addressed to the Deputy Manager, failing that the Manager, and finally the Chair of the Trustee Board.

Sevenoaks CAB

Buckhurst Lane
Sevenoaks
Kent TN13 1HW

Tel: 01732 454443

Fax: 01732 463164

Email: info@sevenoakscab.org.uk

Website: www.sevenoakscab.org.uk



Charity Registration number 268133