

Belfast

Annual Report 2015-16

CHAIR'S REPORT



In reviewing the last year as Chair of Citizens Advice Belfast I have chosen "service excellence" and "positive impacts" from our Mission Statement as a true reflection of the achievements of the Belfast team in 2016. The team strives despite all challenges to maintain focus on the core purpose of the organisation and for that I thank the team most sincerely and say well done; you all work brilliantly, positively and determinedly for those who cannot, for a number of reasons, fight for their rights. The Board is very proud of what you consistently achieve.

Citizens Advice Belfast has a new Board in the last 18 months with 5 of the 8 Trustees joining in 2016. We are completing a detailed skills gap analysis and are about to launch a revised recruitment, induction and performance review excellence pack for Trustees which will ensure exceptional practice in governance, leadership, strategic direction and team building.

I would like to say a huge thank you to our funders and partners who work so well with us in delivering to the citizens of Belfast. You should all be very proud of how you make real differences to real people's lives. Let 2017 be a great year of even better collaboration, communication and working as one truly effective team.

Lucy Traynor, Chair

DIRECTOR'S REPORT



I hope you enjoy reading about all the great work we got up to in 2015-2016 as you go through this annual report. But before you start I just want to say a huge thank you to everyone who contributed to everything we do – to volunteers who come in every day bringing a fresh approach, perspective and a smile, to the Trustees who very skilfully guide us in the direction we need to be going in and to the paid staff who put in huge efforts delivering services to those who need them most. I am hugely grateful to everyone who develops themselves professionally in order to deliver our services ensuring that advice is always delivered by really knowledgeable staff. In everything we do we are proud of our achievements - they don't come through single achievement but because we work as one team.

2015-16 was a year of challenge but we are used to that when we deliver front line services and it doesn't stop us going from strength to strength. This year we helped 41,208 people, with 54,131 problems and phenomenally helped them claim £9.2 million in benefits that they didn't know they were entitled to. We are expanding our services as part of welfare reform to deliver financial capability and we are using our AGM this year as a forum to topically debate its effectiveness in helping people on benefits better manage their financial situation.

The next year will bring further successes for Citizens Advice Belfast and I look forward to the next report in order to share them with you.

Linda Williamson, Director

Volunteer

"Knowing that you have contributed positively to someone's life and eased the pressure and anxiety they have when faced with life's problems makes being an adviser most worthwhile. As an adviser I get a great deal of satisfaction from helping to alleviate the difficulties that people experience when having to deal with government departments and other institutions. It is tremendously rewarding and a privilege to be able to advocate on a client's behalf and secure a positive outcome for them.

Client comment

"Without the adviser intervention, Ryan might have been disallowed his benefit and may have had to undergo a long appeal or indeed a medical examination needlessly. I cannot thank the adviser enough for his help in guiding us through this benefit minefield. Long may your organisation prosper.

MISSION STATEMENT

Through service excellence, we exist to create positive impacts for individuals and communities, by providing clarity and solutions on the issues affecting them

OUR AIMS AND WHAT THEY MEAN IN PRACTICE

Citizens Advice Belfast exists to

- To provide the advice people need for the problems they face in Belfast and beyond
- To improve the policies and practices that affect people's lives by having strong relationships with those who are affected and with the decision makers who create them



Single parent, Nicola Crawford, received a letter in July to say her Child Tax Credit had been stopped without warning. The Belfast mother has two young children, aged 10 and 4. Her youngest child is severely disabled. Nicola remembers the day she realised her money had stopped.

"I had just come back from Manchester Hospital, where my son was undergoing tests, and was shocked to find there was no money in my account. Then I got the letter, informing me that 'my circumstances had changed'. But they hadn't."

Nicola then spent the next nine weeks producing evidence that she was still living alone and not as part of a couple, including gas and electricity bills and a letter from her son's social worker. However, HMRC said they were closing her case. Nicola like many others was accused of co-habiting and no evidence of this was produced by HMRC.

"I don't know who I am supposed to be living with. They won't tell me. So it's difficult to prove that I'm not."

"I am struggling to cope with a very ill child and at the same time spending hours trying to get through on the phone to speak to someone. I usually just hang up."

Nicola is now undergoing a Mandatory Reconsideration of her case but there is no time limit on how long this will take or if it will be successful. In the meantime, she is losing £200 a week and is struggling to pay her rent.

"My housing benefit has stopped as a result of this and my home is now under threat."

"I have nothing to hide and I don't want others to go through this stress and anxiety. I am angry that this is happening to me because I haven't done anything wrong". I am eternally grateful for the support of Citizens Advice Belfast throughout this fight, they have written letters and made phone calls and ensured my housing benefit did not stop.

OUR JOURNEY IN WORDS AND PICTURES



APRIL 2015

We improved on our previous success of obtaining Investing in People by achieving Silver status



JUNE 2015

During Volunteers Week we brought the entire team together to celebrate our successes



AUGUST 2015

We achieved 94% in our Quality of Advice Audit, testament to our people and processes



DECEMBER 2015

Paul Hughes, a long serving volunteer, receives an award from Citizens Advice NI for Volunteer of the Year



DECEMBER 2015

We received funding for two trainee adviser positions through Belfast West Integrated Employment Programme



JANUARY 2016

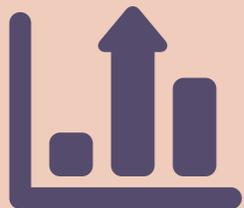
Our Chair Lucy Traynor is shortlisted as Trustee of the Year by CO3



MARCH 2016

We end our year with our successful integration of all Macmillan Financial Help Services across NI, helping to make life easier for people affected by cancer

WHAT WE ACHIEVED AND WHAT WE WILL DO NEXT



GROWTH

We said we would diversify our funding base and we did, we developed new services for Positive Life and began talking to new partners.

We plan to develop services with Cedar Foundation, Chest, Heart and Stroke Association and National Energy Action.

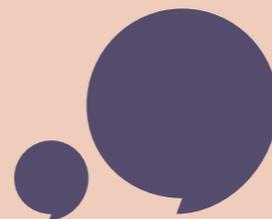


PEOPLE STRATEGY

We said we would create opportunities for training and development. We recruited 33 volunteers training them to be advisers.

We trained our staff in leadership and presentation, we invested in the future with two members of staff undertaking Train the Trainer.

This year we will continue this trend - we are investing funds from Belfast City Council and the Department for Communities in Welfare Readiness. We also plan to achieve Investing in Volunteers.



ADVICE SERVICES

We developed new partnerships and we began to get our staff teams ready to deal with welfare reform.

This year we will purchase new telephony with room for expansion, the ability to offer home working and we will develop our web presence using web chat to deliver a new access route for our clients.



PROMOTING THE ORGANISATION

We used social media widely to deliver our messages attracting a following of 1565 followers.

We plan to develop a website creating an identity for Citizens Advice Belfast that is modern representing positivity and which is fully accessible.



EFFECTIVE GOVERNANCE AND FINANCIAL PRUDENCE

We appointed a Governance Champion to deliver the Charity Commission's Code of Good Governance.

We plan to develop best practice in robust recruitment, induction, appraisal and code of conduct processes for Trustees.

HOW MANY PEOPLE WE REACHED

£9.2M

Money that clients received in benefits because of our intervention



33

New volunteers



41208

Contacts with clients



HOW WE HELPED PEOPLE



13%

Increase in telephone enquiries



57,000

Calls, working in partnership, to our single number for advice
0300 1 233 233



8%

Increase in contacts



6%

Increase in problems



£9.2M

Benefits to clients



16,584

Volunteering hours



100%

Client satisfaction



8%

Increase in income generated

Number of problems that we dealt with

54,131

Issues such as:

consumer, debt, social security, education, employment, finance, health, housing, immigration, legal, relationship, signposting, tax, travel and utilities

ACCOUNTS

Statement of financial activities (incorporating the income and expenditure account) Year ended 31 March 2016

	Notes	Total Unrestricted funds 2016 £	Total Restricted funds 2016 £	Total funds 2016 £	Total funds 2015 £
Income					
Donations and legacies	2	4,427	-	4,427	6,687
Income from charitable activities	3	134,082	752,625	886,707	769,654
Other trading activities	4	-	-	-	29,797
Investment income	5	152	-	152	240
Other income	6	-	-	-	48,181
Total income		138,661	752,625	891,286	854,559
Expenditure					
Expenditure on charitable activities	7	(68,230)	(738,184)	(806,414)	(726,339)
Expenditure on raising funds	9	-	-	-	(29,797)
Total expenditure		(68,230)	(738,184)	(806,414)	(756,136)
Net income/(expenditure)		70,431	14,441	84,872	98,423
Transfer between funds		38,179	(38,179)	-	-
Net movement in funds		108,610	(23,738)	84,872	98,423
Reconciliation of funds					
Total funds brought forward		189,147	59,122	248,269	149,846
Total funds carried forward		297,757	35,384	333,141	248,269

The Statement of financial activities includes all gains and losses in the year. All of the above amounts relate to continuing activities.

ACCOUNTS

Balance sheet as at 31 March 2015

	Notes	£	2016 £	2015 £
Fixed assets				
Tangible assets	14		143,114	154,810
Current assets				
Debtors	15	3,968		3,605
Cash at bank		212,213		113,124
		216,181		116,729
Creditors: Amounts falling due within one year	16	(26,154)		(23,270)
Net current assets			190,027	93,459
Total assets less current liabilities			333,141	248,269
Net assets			333,141	248,269
The funds of the charity:				
Unrestricted income funds	17		297,757	189,147
Restricted income funds	18		35,384	59,122
Total charity funds			333,141	248,269

The financial statements were approved by the board on 8th November 2016 and signed on its behalf by:

Philip Reid
Director

Lucy Traynor
Director

Citizens Advice Belfast Board Members 2015-2016

Lucy Traynor *Chair*

Julia Logan

Rosy Billingham

Tara O Hara

Michele Crilly

Philip Reid *Treasurer*

Catherine Davies

Htaik Win

Lizanne Frawley



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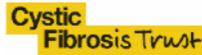
www.citizensadvice.co.uk



Belfast
City Council



Belfast Health and
Social Care Trust



CHANGING LIVES EVERY DAY



Department for
Communities
www.communities.gov.uk