

# InSight

**CITIZENS ADVICE WAKEFIELD DISTRICT NEWS ISSUE 80**

**citizens  
advice** Wakefield  
District

## **WMDC Visits**

We had 2 visits from senior staff at WMDC in March; Chief executive Merran McRae who was very interested in our work and said we were well respected by the local authority and Rob Hurren - WMDC Corporate Director of Integrated Care (Integrated health and social care system).

Rob explained the new connecting care developments across Wakefield and how we could work more closely in the future, to help local people. Anne will invite his staff to participate in the Live Well project and Mandy and Anne are due to visit one of the hubs in October. From 2019 we will be able to refer in to the Connecting Care hubs.

## **CitA News**

Sir David Varney will be stepping down as Chair of Citizens Advice for health reasons in the autumn after 3 years. CitA will be starting the search for two new members of the national trustee board, including a new Chair. The aim is to recommend a new trustee for appointment at the national Trustee Board meeting on 25 July, and Chair for election at our AGM on 11 October in Manchester. Ann-Marie Harkin has recently been appointed as a new national trustee. Ann-Marie is a director at the Wales Audit Office and brings an incredible wealth of public sector audit knowledge to the team.

## **Money Advice Service**

The 2018/19 mainstream agreement with the Money Advice Service has now been finalised and signed by the Money Advice Service and CitA. Wakefield's agreement will be issued shortly.

Throughout 2017/18 CitA were in dialogue with the Money Advice Service about the challenges participants are having with achieving the project's forecast, whilst trying to balance the quality requirements. Money Advice Service has listened to these concerns and have agreed to reduce the forecast by 10% in 2018/19. This reduction will apply immediately.

This is a great outcome. However at this stage the Money Advice Service has only committed to this reduction for 2018/19 and will continue to monitor the performance of this project (including quality performance).

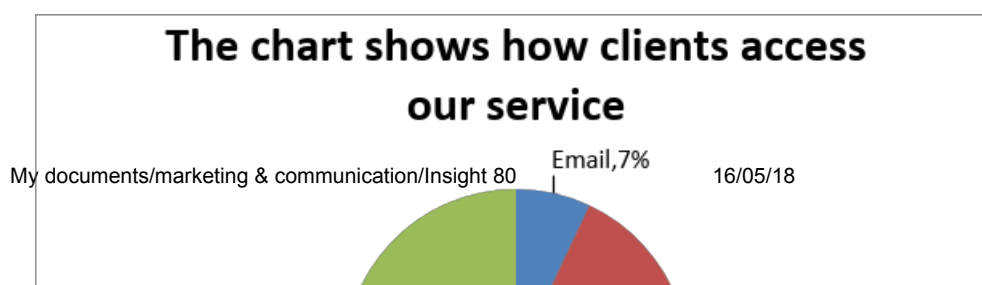
### **MAS Performance 1<sup>st</sup> April 2017 – 31<sup>st</sup> March 2018**

- ⇒ Last 12 months of our contract we finished at 97%
- ⇒ Across the past 12 months up to 31<sup>st</sup> March 2018 we advised and assisted 1979 individual clients in debt
- ⇒ Overall our contract running from October 2014 – March 2018 we finished at 92%, with advice and assistance being given to a total of 6583 individual clients.

**Our 2018 AGM will be held on  
10<sup>th</sup> October at 5.30 pm**

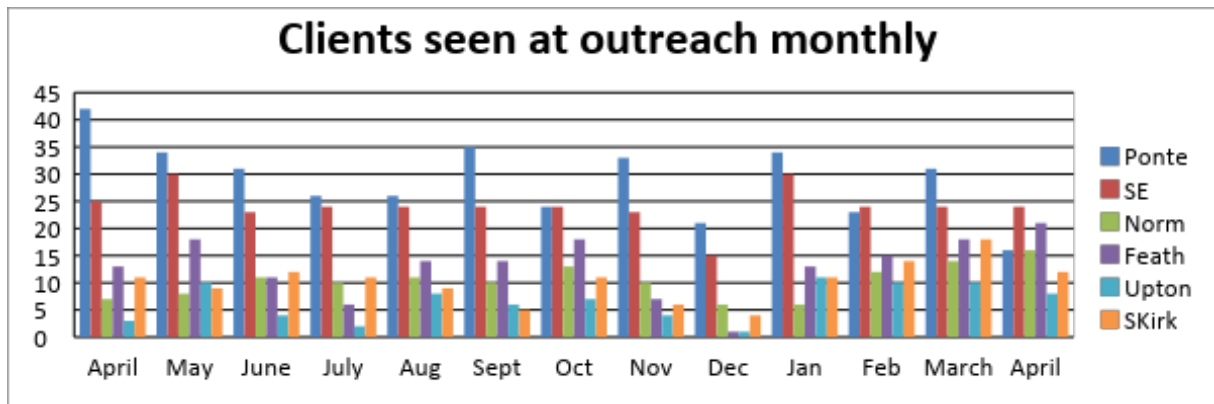
### **Generalist advice**

Benefit enquiries are still the biggest enquiry area with personal independence payments (PIP) and employment and support allowance (ESA) the main issues we are dealing with. Our client profile shows that 44% of our clients are either disabled or have long term health conditions. The majority of our clients still access our service in person either at our outreaches or at the Wakefield office.



## Outreaches

Welcome back to Outreach Worker Julie Livesey who will take over from Wendy at the Normaton, Featherstone, Upton and Moorthorpe outreaches. The outreaches remain busy dealing with a variety of issues however the main issues are still benefits and debt.



## Citizens Advice Performance and Quality Leadership self-assessment - February 2018

We scored 4s or 5s across all areas of leadership including Governance, Business Planning, Risk Management, Financial Management, People Management, Operational Performance, Partnership Working, Research and Campaigning, Equality Leadership. The overall rating was 5/5 and the Performance Assessor commented:

*The organisation has demonstrated excellent leadership overall, building upon its performance at the last assessment.*

Citizens Advice uses a traffic light system and we have scored green across all areas. Added to our ongoing Quality of Advice scores (also consistently green), this is a fantastic result for all staff and volunteers and Trustees have asked that their thanks are conveyed to all.

## Research & Campaigning

### National calls for evidence

- ❖ Impact of deadline for complaints about PPI
- ❖ Issues relating to BREXIT
- ❖ Doorstep loan/home credit

- ❖ New housing benefit transitional payment/run on
- ❖ Revenge eviction

### Campaigns

We will be taking part in Scams Awareness month during June. Citizens Advice provide posters and cards to hand out to clients, these will be available at all our outreaches as well as our Wakefield office.

### **People Management Survey**

We can conclude from the survey that communication between Trustees, Managers, paid staff and volunteers is viewed as an area of potential weakness and Management Team has been considering ways of addressing this. Communications have always been a challenge for a number of logistical reasons so these findings are not a surprise.

#### **Current communication methods include:**

##### Newsletters

- Mandy writes a General and a Debt newsletter for external partners
- Liz writes Insight on behalf of Trustees after each DTB – external and internal
- Vanessa (Staff Rep) is soon to introduce a monthly staff email newsletter
- Bryn writes a weekly Volunteers' Briefing which goes on the notice boards in General Office and the telephone room

We have a Staff rep and a Volunteers Rep on the Trustee Board who can bring issues and feedback to staff and volunteers.

We have a Volunteers' notice board and also a 2 x Research & Campaigning notice boards (1 in the contact centre and 1 in the corridor) which includes calls for evidence, campaigns etc.

Mandy tweets on our behalf – anyone can follow us on Twitter.

We use email to communicate with staff and volunteers. Casebook now has a facility for team messages.

##### Current meetings include:

- Volunteers
- DTB
- Money Advice Unit
- Service Managers

- Management Team

For future consideration we are looking at improved staff room facilities.

### **Volunteers & Training**

6 new volunteers started training to be Telephone Assessors a few weeks ago. They are the second group to undertake a more in depth training programme which will result in less time required when it comes to their second stage of training in a couple of months' time, when they learn how to be either Generalist Advisers or Benefits Assistants.

Livewell Grant - Benefit Assistants who help clients to complete forms. We have two volunteers on the rota Pete is in the process of training another three. He will be delivering training on the public site to staff at the hubs later in the year and also staff at community anchors, the dates are to be arranged.

3 Telephone Assessors have started additional training to become Generalist Advisers and are almost ready to start advising clients with support. We are currently recruiting for the next intake of volunteers which will be in August.

Staff and volunteers who work on the drop in service (Contact Centre) have attended a short refresher training session to clarify the boundaries of the role in the contact centre, covering when to take clients into a private, confidential interview room and how to record their cases on Casebook.

**Volunteers weeks 1<sup>st</sup>-7<sup>th</sup> June**  
**We are having a stall in Wakefield on the 1<sup>st</sup> of June and Pontefract on the 6<sup>th</sup> June as part of Wakefield celebrating volunteers week.**

**This newsletter is produced by Wakefield District Citizens Advice Bureau. It comes out bi-monthly. Please tell us what you think of the newsletter and our service. All suggestions are welcome.**

**All comments to Liz Halliday, Chief Executive on 01924 234001 or email on**

[lizhalliday@wakefielddistrictcab.co.uk](mailto:lizhalliday@wakefielddistrictcab.co.uk)