

Citizens Advice South Lakeland

Summary Annual Report 2008/2009



www.cabsouthlakeland.org.uk

Registered Charity No. 1093888

Company No. 4500088

Registered Office: Blackhall Road, Kendal, Cumbria, LA9 4BT.

CITIZENS ADVICE SOUTH LAKELAND

Citizens Advice South Lakeland (CASL) provides free, independent, confidential and impartial advice to everyone.

We aim :

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives by influencing policy makers with clear evidence

We are an independent, registered charity. Without funding and volunteers CASL could not continue to provide its services.

Our volunteers are fully trained. Typically it takes 12 months for a volunteer to become fully-qualified. We are rigorously audited regularly for the quality of advice we give.

OUR ANNUAL REPORT

This report tells you about the Trustee Board that directs the service, and the Manager's report on the past year. It tells you how many clients came to us in Kendal and Ulverston and the problems they faced. It also tells you about the specialist Contract services we provide and spells out our financial situation.

CASL – AN OVERVIEW

We know how much our service is needed, particularly in the current economic situation. We receive grants towards the cost of the General Advice Service, particularly from the South Lakeland District Council, local Town and Parish Councils, together with grants from private Trusts. Through our Friends initiative we receive valuable grants from Lakeland and other organisations and individuals. We receive no government grants.

Our Contract services are specialist services provided for clients such as the Legal Services Commission, the County Council and MacMillan Cancer Care, funded on a contractual basis for particular client groups.

General Managers Report 2008/9

In 2008/9 Citizens Advice South Lakeland again played a vital part in addressing the needs of the growing number of local people who found themselves in hardship or difficulty and in need of expert, independent and free legal advice and support.

Last year saw an increase in the number of people helped by the bureau for the third year in succession. At the same time the advisers also increased the amount of time and depth of involvement involved in those enquiries, resulting in over 13,000 separate contacts with clients and an array of agencies and organisations when acting on the clients behalf.

Thanks to a successful application for central government funding intended to help people and families as the economic downturn, February 2009 saw CASL increase its open hours in Kendal by almost 50% with a similar expansion at the Ulverston office due in the new financial year. Although this funding is strictly limited to March 2010 the increased service will be welcomed by the many local people CASL had previously been forced to turn away week after week because its was working at capacity.

Another stride forward came with the new Financial Capability project. A team of volunteers will take the bureau's unique experience and expertise about daily money matters out into the community, providing training & guidance to help prevent money difficulties from becoming serious money problems.

Looking forward, the immediate future offers still more positive developments, with CASL playing a leading role in the strategic development of a Cumbria Advice Network that will provide a seamless and accessible advice service across the whole county.

Yet all these successes - indeed all CASL's remarkable services to the community - are built upon financial foundations that are far from secure. The funding for the additional services and developments is firmly ring fenced for the additions they bring, and the unrestricted funding that pays for all the basic essentials continues to be chipped away.

It was this financial pressure that forced redundancies in each of the 2 previous years, and with the bureau again facing severe difficulties in 08/09, the paid staff agreed to have their pay frozen at last year levels. That such a step should be forced upon a most reluctant Board of Trustees is evidence of the clearest kind that these financial pressures pose a genuine threat to all the bureau does for so many of those in most need.

In 2008/09 all CASL's services - helping clients facing unemployment, or cancer, or disability, or discrimination, or unfair dismissal, or repossession, or bereavement, or a cold winter without heating - were delivered by a skilled and dedicated, a quite remarkable, team of committed volunteers and paid staff. Once more it was my privilege to work with that team, and I take this opportunity to say thank you to them all.

Jez Such

TREASURER'S REPORT

As a result of the staff agreeing to a 12 month pay freeze we managed to get through another year with only a small deficit (£19,000). During the year we always maintained a cash balance above that set as the necessary Reserves level by the Trustees, of £ 79,300

This situation cannot continue without significant change as the survival of the service to the local community depended on the generosity of the staff AND a major reduction in the small administrative staffing in the core service. Basically this means that all staff are doing a lot of bureaucratic work which reduces their time with clients, as well as donating this year's cost of living increase to CASL.

Our existing contract services continued to perform, serving their clients well and meeting their performance targets. We continued to deliver the existing opening hours for the General Advice Service for most of the year. Then in February we were able to add 5 more hours at each Bureau, paid for through the Government funded Additional Hours of Advice. This will only continue until March 2010, under current provision.

Once again the Trustees are extremely grateful the efforts of all those involved in the Friends of CASL, which raised many thousands of pounds for the general Advice Service and the core organisation.

Our outlook continues to look bleak, despite a slightly more satisfactory position in the current (2009/10) year due to temporary grants. It is clear that locally and nationally people do not realise that we are a charity, depending on grants and donations to provide the General Advice Service. We need to get the truth out locally as much as we all can.

PUBLIC BENEFIT

The Charities Act (2006) requires all charities to state explicitly in their Annual Report how their aims are to benefit the public. The introduction to this report sets these out very clearly, and all our activities contribute to meeting these aims in the communities we serve.

In particular we work for the prevention and relief of poverty, and focus on the relief of those in need, for whatever reason.

Martin Jones

CHAIR'S REPORT

It will be seen from the Treasurer's Report that our financial position continues to give rise for concern. We had hoped to alleviate some of our pressures by merging with Cumbria Rural CAB and much time and effort went into trying to create a new organisation that would have covered the area currently occupied by our two bureaux. Unfortunately, the merger had to be called off when the scale of CASL's pension liability was recognised. The liability is not likely to cause problems in the immediate future and may eventually be resolved, but it remains a difficulty which has to be overcome.

Several measures were taken during the year to contain costs and maximise income. One of the ways in which expenditure was restricted was an agreed pay freeze. Some confusion arose as to the extent and timing of the freeze, and Trustees and staff entered negotiations in order to resolve the problem. Happily agreement was reached and good relations between staff and Trustees continue. The Board would like to acknowledge the patience and understanding shown by the staff during these difficult times.

A debt of gratitude is also owed to our many volunteers, whose unpaid work provides an invaluable service to the citizens of the area.

The Board would also like to acknowledge the tremendous effort made by our Manager, Jez Such, who left the organisation in May. Jez has worked tirelessly for us and will be very much missed. We are, however, fortunate to have found a replacement for him. Georgina Livingstone has been appointed from September 2009 and we very much look forward to working with her.

We also say "farewell" to Alan Goda, a Trustee who worked hard for CASL for four years. We shall miss his Personnel expertise and the valued wisdom and experience he brought to all aspects of the business.

We are optimistic that we can contain our financial problems with hard work and some sacrifices. We also continue to create income generation whenever possible and we are confident that Georgina Livingstone will bring new energy and ideas to this area.

We will also have a new Chair. Martin Jones has been our Treasurer through these difficult times and I know that, as Chair, he will be the ideal man to lead CASL forward.

D Jordison

Friends of CASL

Aims

The small committee answerable to the Trust Board hopes to promote public and corporate awareness of Citizens Advice South Lakeland (CASL) and to increase finances through voluntary donations.

Report

Earlier this year Alan Goda, Acting Chair of “Friends” resigned and relocated to be with his family in Kent and the committee wish him well.

This year Sam Rayner the CEO of Lakeland has again gifted £3,500. Other Trusts and companies have made donations, and there have been a number of other individual sponsors.

Members of the committee have been instrumental in securing funds for the new enterprises and an attempt has been made to involve every member of staff to provide one significant key contact for future fundraising.

Membership of “Friends of CASL” is in two categories, taking advantage of Gift Aid, where money is reclaimed from the Inland Revenue:

Corporate Friends

- Gold: £1000 minimum donation
- Silver: £500 or £40 per month donation
- Corporate: £100 or £10 per month

Individual Friends

- Gold: Minimum donation of £50 per year
- Silver: £20 per year or £2 per month

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