

# Citizens Advice in East Dorset and Purbeck

# Annual Review

2020 - 21



East Dorset  
& Purbeck

# About us

Citizens Advice in East Dorset and Purbeck is an independent charity that provides free, confidential and impartial advice and support. Our goal is to help everyone find a way forward, whatever their problem.

We have offices in Wareham and Wimborne as well as outreach locations across East Dorset and Purbeck, and are part of the Citizens Advice network in Dorset and across England and Wales.

## Our aims

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives

## Our principles

- Free
- Confidential
- Independent
- Impartial

## Our impact

- For every £1 invested in our services, we financially benefit clients by £8.69
- For every £1 invested in our services, we add £16.25 in public value
- We reduce public expenditure on homelessness, unemployment, mental health services and legal action
- Our volunteering brings people together, improving our local communities and the people we help

## Contact us

- [www.edpcitizensadvice.org.uk](http://www.edpcitizensadvice.org.uk)
- Dorset Adviceline freephone 0800 144 8848, textphone 0800 144 8884, Mon-Fri, 10am-4pm



@CitAdviceEDP



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# Chair's Introduction

**It gives me great pleasure to introduce and commend the Annual Review of the activities of Citizens Advice in East Dorset and Purbeck. It was felt appropriate to combine the review to cover both the East Dorset and Purbeck offices and I hope you find the review interesting reading. The two bodies came together on the 1st April 2021 and I was appointed their first Chair.**

Last year has been one of the most challenging with three main strands running throughout the year – the pandemic, the merger, and the future of Citizens Advice in Dorset (CAiD).

The Chief Officer's report covers in detail how the service adapted to the pandemic leading to a change in how advice was delivered. There were a number of grants available which enabled both offices to re-equip and update IT equipment, provide additional support in the area of mental health and to scope out the most suitable methods of providing advice across the area.

Following the East Dorset Manager's decision to step down at the end of September 2020, the Purbeck Trustee Board were approached and agreed to pursue working together. After discussions, it was agreed to carry out the necessary steps for a merger of the two offices. The rest is history and following a lot of hard work the process was completed by the end of March 2021. Thank you to all involved and to Helen Goldsack the Purbeck Manager for taking on the responsibility for the two offices. Why merge, you may ask yourselves? Trustees saw this as an important step forward in maintaining and enhancing the services provided to the communities that East Dorset and Purbeck serve whilst also giving a stronger voice within Dorset.

A significant amount of time continues to be spent working closely with the other local offices through CAiD to ensure that Citizens Advice in Dorset speaks with one voice and is ready for the challenges that the service faces. This was important as Dorset Council put their Advice, Guidance, and Information Services contract out to tender in June 2021. CAiD bid on behalf of the local offices and by winning the contract, the advice service will be protected for the foreseeable future.

A significant proportion of both organisations' income comes from Dorset Council, Parish and Town Councils as well as other organisations and a big thank you to them for their continuing support.

The trustees are very pleased that the high level of support for the community has been maintained with the challenges the service has faced over the last year and it is a very big thank you to all the staff and volunteers involved. I would personally like to thank all the trustees for their support as we look forward together to addressing the challenges that the future will bring.

**Alan Breakwell**

**Chair of Trustees**

*The Trustee Board oversee the information security of all personal information of our clients, staff, funders and strategic partners that is processed. Citizens Advice in East Dorset and Purbeck hold joint responsibility for client data that is held in our case management system, with the national Citizens Advice Service. An information assurance management team exists to ensure the confidentiality, integrity and availability of all personal and sensitive data is maintained to a level which is compliant with the requirements of the General Data Protection Regulation and Data Protection Act 2018.*

**In 2020-21**  
**Citizens Advice in East**  
**Dorset and Purbeck**  
**gave advice:**



**to 5,398 clients**



**on 19,429 issues**

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## Top issues:



**Utilities/comms**  
**4,272**



**Debt**  
**1,613**



**Benefits (excl UC)**  
**3,759**



**Housing**  
**1,207**



**Universal Credit**  
**2,605**



**Employment**  
**1,086**

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### **£6,651,853 - Value to the people we help**

We helped individual clients to achieve financial outcomes including back-dated benefits, writing-off debts and refunds for consumer issues.

### **£12,441,519 - Total public value**

When people have fewer problems they have higher levels of wellbeing, participation in society and productivity. Our calculation of public value also includes the value of a volunteer run service.

### **£9,241,471 - Economic and social value**

The public value of improving our clients' wellbeing, including emotional wellbeing, family relationships and positive functioning.

### **£1,568,487 - Fiscal value**

Financial savings to local and national Government due to fewer payments for out-of-work benefits, costly evictions, re-housing evicted tenants and less demand on the NHS.

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# Overview from our Chief Officer

## ...and then Coronavirus happened...

This year has most certainly been a challenge, not only for those of us in Citizens Advice, but for the nation as a whole.

As we entered the new financial year we were in the very early days of lockdown. In response to the COVID-19 pandemic, we had to deliver all of our client work through phone and online channels. We rose to this challenge with remarkable resilience and commitment. As I write this report, I am conscious that both Citizens Advice East Dorset and Citizens Advice Purbeck have had to adapt to an entirely new set of circumstances and had to adapt without warning and at pace.

Our success in maintaining such high-quality advice services has rested on the commitment and flexibility of all the staff and volunteers. Our team adapted remarkably well to working from home. Many volunteers were not used to or familiar with remote supervision or advising by email or phone, but as always, they did not let the clients or the service down.

We focused on improving access to remote advice whilst increasing our capacity to advise more clients. This was achieved by ensuring we made it as easy as possible for volunteers to advise from home. Through fundraising we were able to provide our team with laptops, VOIP phones and invested in Zoom packages to keep everyone connected. Some of the team piloted giving advice through video conferencing platforms and we also set up systems to provide advice this way in the Wimborne office.

Alongside the success of our fundraising, we continued to transform the general advice service creating a multi-channel provision with increased capacity. As lockdown eased and some face-to-face resumed, we identified that there were often lengthy delays for volunteers seeking supervision because we were trying to support two very different services (face-to-face drop-in service/call backs and emails and telephone advice) with one supervision model.

We decided to create two separate adviser teams focused on face-to-face/email or phone delivery. The Adviceline Team, managed by Adam Spong, was set up to test the effectiveness of providing dedicated supervision to those advisers working on Adviceline. This initiative led to improved outcomes for clients, the creation of a new "call back" option for clients and a more enjoyable and supportive operational environment for our volunteers. We are optimistic that this pilot model will be rolled out across Dorset.

I cannot thank the team enough for their resilience and dedication to helping our clients, regardless of the impact this dreadful virus had on themselves.

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## ...and then the merger process began.

We were also two independent organisations, but in September 2020, the former East Dorset Manager, Dorne Hardyman, took the decision to retire. The trustees of both organisations agreed to a merger and in October 2020, I became the Interim Manager of East Dorset alongside Chief Officer of Purbeck.

Merging two organisations is quite a challenge in itself, but coupled with ongoing remote working the challenge was made greater. However, I am pleased to report that through hard work and collaboration the merger completed on 1st April 2021 when we became Citizens Advice in East Dorset and Purbeck.

Thank you to the team for adapting, once again, to changes. We are a team that is driven by the needs of our clients and an unwavering commitment to achieving excellence. This year we have continued to assist more clients than ever before, helping them throughout the pandemic to secure welfare entitlements, uphold their employment rights and overcome adversity or financial distress.

One of the continuing themes behind our success is our innovative approach to delivering and managing advice services. We were quick to respond to support Dorset Council to deliver much needed financial support through the Winter Warmth Scheme. The year ahead is going to bring new, post-COVID challenges, but I am confident that we will overcome these and will continue to provide advice to all those that need our help.

As an organisation we are committed to working with other agencies. In doing so, we are able to extend access to our services through other agencies' client contacts. Over the year we have worked closely with the other three Citizens Advice organisations in Dorset on a number of initiatives exploring opportunities for greater joint working. One aspect of this work has been an agreement to provide grant administration support for Citizens Advice Bournemouth, Christchurch & Poole. Another is the establishment of a Dorset Employment Unit, a trailblazer unit providing increased access to specialist employment advice and training. Moving forward we plan to develop further subject based units in Dorset.

During the year we significantly increased our use of social media as a means of engaging new clients, raising awareness of our work and campaigning on key issues in the locality. The development of our new website has already revolutionised the way we engage with clients, by providing the 'how can we help' function to assist clients to self help more effectively. We are looking forward to developing the website even further over the forthcoming year.

Over the course of the next business plan (2021-2024) we will continue to innovate and adapt and have plans to build on the successful pilots completed during 2020/21.

**I would like to thank all of our staff, volunteers, trustees and partners for their hard work and support. It is a great pleasure to work alongside so many talented and committed people.**

**Helen Goldsack**  
**Chief Officer**

# Our team

**57 volunteers  
give over 260  
hours of their  
time each  
week...**



**..the value of  
volunteering  
in East Dorset  
and Purbeck  
in 2020/21  
was **£382,324****



**as...  
39 Advisers  
7 Admin  
2 Campaigns/  
Comms  
9 Trustees**



**Volunteering  
benefits our  
volunteers  
socially, mental  
wellbeing, fun,  
fulfillment, job  
training**



**...and we're  
supported by  
30 paid staff**

# Housing Casework - The Jam in the Middle

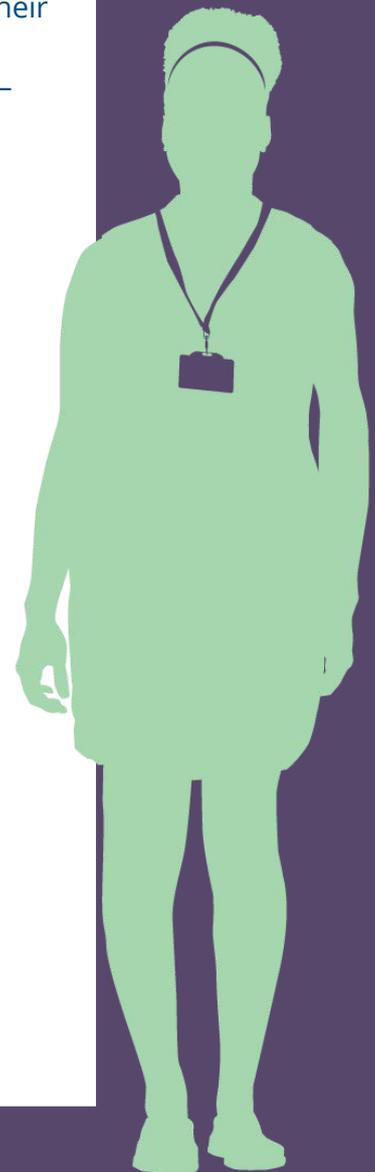
Despite the temporary bans on evictions during the COVID-19 pandemic the number of housing cases has not diminished. The fact that a landlord could not enforce a court order to evict did not mean that people were not struggling with their rent and would be facing eviction at a later date. The ban was just a sticking plaster to keep things in a holding pattern.

Much of our work this year has been with those people whose already precarious financial circumstances have been made worse by the consequences of the pandemic – they may have lost their job, been placed on reduced pay under the furlough scheme or found that all their household bills have increased because the whole family are now at home all day every day. Their rent then seems to be less of a priority – when of course it is not!

We have continued to work with clients who are already in the homelessness system - they may be in emergency or temporary accommodation. Some are passed to our Housing Projects which offer an holistic approach from the combined work of housing, benefit and debt caseworkers - the aim being to prevent the client from returning to circumstances in which they are likely to lose their home. We want them to understand where things went wrong previously and know where to seek help before things become detrimental. We do all we can to ensure they are in a position to be able to sustain a tenancy in the future.

Apart from advising and supporting the role of the Housing Caseworker is to be the jam in the middle of the sandwich between the client and the Housing Needs Team. So often a client feels unable to voice their concerns or to present their case appropriately to the Council. Citizens Advice can do this for them. We have spent many years building up a good working relationship with the Housing Needs Team. We try to work with them on behalf of our clients in order to get the most favourable result.

**Philomena Murphy**  
**Housing Caseworker**



# Emma and Lorna's Story

## **Case Study:**

*Emma and Lorna 18 and 20 were living at home with their Mum. Mum was the sole tenant of their social housing property.*

*Mum passed away very suddenly. The girls had no idea what would happen to their home in the circumstances and how they would survive financially. Emma in particular suffered with health issues and seemed rather vulnerable.*

*Citizens Advice helped them make contact with the social housing provider and negotiate a year-long time frame for them to find alternative accommodation. We assisted them to make applications to the Housing Register and guided them through the bidding process. We liaised with the Housing Needs Team on their behalf, supplying a summary of their circumstances and continued to highlight their case with the Council. We kept contact with the girls asking for updates so that we could voice their concerns to the relevant party if necessary. They knew they could contact us if they had any worries.*

*In the meantime, Citizens Advice advised the girls on their benefit entitlement, helped them with benefit applications and budgeting. It meant they were able to sustain their late mother's tenancy until their move.*

*Lorna has now moved on to private accommodation with her partner – it was a choice she thought about and discussed. We have recently heard that Emma has received the keys to her new social housing flat in an area close to her support network. She has been working, her finances are under control and her mental health has improved. Both girls expressed a genuine appreciation for the way in which Citizens Advice have advised and supported them.*



# The Energy Team - Fighting Fuel Poverty

Our Energy Advice Project, Fighting Fuel Poverty, is funded by The Energy Industry Voluntary Redress Fund to support people across the whole of Dorset who are on a low income and at risk of being in fuel poverty, which is essentially a household spending 10% or more of their income on gas and electricity costs. It is funded for 2 years, having started in August 2020 we now have five part-time Energy Caseworkers who are qualified up to NVQ Level 3 in Energy Awareness. To date we have helped over 1,000 households and gained income of almost £400,000 through both energy saving and benefit/grant related income.

Our Energy Caseworkers will discuss the type of heating and hot water system, ways to reduce this expense, help to avoid debt and disconnection, completing an energy comparison to check if there are better deals available, ask about the types of insulation the property has and make referrals where this is an issue. If there is an issue, we can contact the supplier helping to resolve any complaints. Dorset has a large number of homes without mains gas supply and our energy advisers will talk through this with our client.

We are fortunate with this project to be able to assist at maximising our client's income by completing a benefit check and helping with welfare benefit applications to increase the household income and we have access to a grant to give our eligible clients some help with their energy costs during the winter months.

The project aims to build financial resilience among vulnerable consumers and increase the likelihood of households being able to meet their heating requirements to stay warm and safe and avoid cold-related health problems by reducing energy costs, maximising the household income and reduce fuel poverty for people across Dorset.

**Ros Dignan**  
Project Supervisor



# Jo's Story

## **Case Study:**

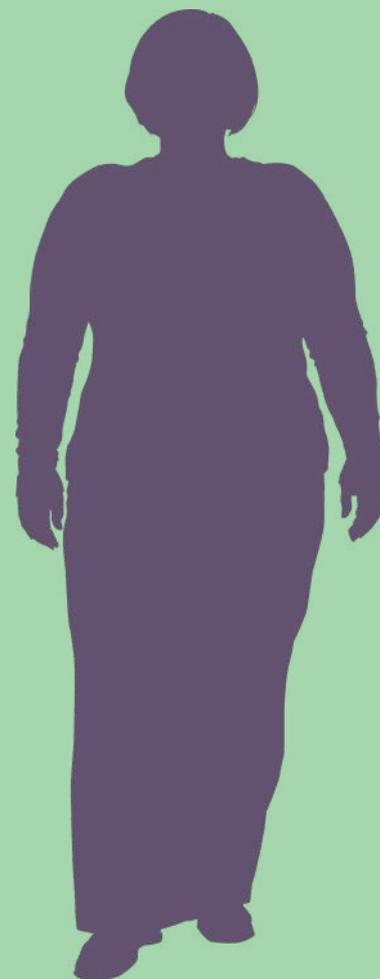
*Jo lives in a 3-bedroom house rented from the Council. Earlier in the year her granddaughter came to live with her under a "child arrangement order". Over the years, Jo also had a variety of health issues so she was no longer working.*

*Jo was referred to us for support to reduce her energy costs and to be able to afford to look after her granddaughter and herself.*

*She was on Universal Credit, but the child element had not been awarded.*

## **Outcome:**

- *Registered Jo on the Priority Service Register.*
- *Provided information for Jo to apply for the warm home discount scheme 2021/2022, a credit of £140 to her electric account.*
- *Reviewed Jo's tariff, she was on the best tariff option*
- *Provided Jo with energy saving tips to reduce her gas and electricity consumption, saving money.*
- *Supported Jo to obtain a £200 Summer Support Grant of £60 food voucher and £147 prepayment meter fuel vouchers*
- *Supported Jo to complete Child Benefit forms, £21.15 a week.*
- *Supported Jo to access Universal Credit to ensure update of entitlement, increasing benefit by £331.33 a month; and to challenge backdated claim from 1 month to 3 months.*
- *Supported Jo to liaise with Universal Credit to update claim with Occupational Pension.*
- *Advised Jo on access to Pupil Premium; Family Holiday Association; apply for Social Water tariff.*
- *Accessed Council support to apply for Discretionary Housing Payment.*



# Macmillan Project - Guidance and Support

It goes without saying that this past year has been a very strange one for those of us working on the Macmillan Project. Firstly, home visits had to be abandoned and, during the height of the pandemic, there was a worrying decrease in referrals from the cancer specialists. We continued to support our existing clients and those clients that did receive diagnoses during this time were coping with the added stresses of attending hospital appointments alone, without the support of their close friends and family. As lockdown has eased we have seen referrals climbing and are aware that this increase will, most probably, continue over the next few months.

Having cancer can be expensive. You or your family's income may go down and your spending may go up. You may have to pay for a special diet, childcare, higher heating costs or travel to a hospital. We can help by taking a 360 look at finances and identifying benefits or grants that cancer patients can apply for to make life just that little bit easier at such a stressful time. And we can help to guide them through the seemingly endless pages of baffling application forms. While we deal primarily with income maximisation we can also help or signpost clients who need advice on housing, care costs, energy efficiency and employment. Our service aims to benefit the whole family and, should the worst happen, we support surviving relatives navigating bereavement benefits and adjusting to their changed lives and circumstances.

A recent review of feedback forms showed that 100% of Macmillan clients and their families have been either satisfied or very satisfied with our service, with over 60% reporting that they worry less about their financial situation having seen a Macmillan Adviser and 90% reporting some financial gain. Below are a couple of client comments:

*"They have helped me so much and are always there for me if I want to ask questions or need advice – our adviser has been excellent for me. Thank you."*

*"Our adviser was outstanding in her knowledge and help. Not only with the financial help but with emotional support too! With a very caring and pleasant nature so thank you all."*

**Sophie Brown, Susan Ridley**  
**Macmillan Caseworkers**



# John's Story

## **Case Study:**

*John was referred to us in December 2020 with a diagnosis of bladder cancer and acute renal failure. John was in his early 40s with a partner of 22 years and four children aged from 10yrs to 20yrs. He was self-employed and a homeowner with a mortgage.*

*John's medical condition meant that he was in and out of hospital for operations, chemotherapy and immunotherapy. His Macmillan adviser was able to carry out a benefit check and advised him on the benefits he was entitled to claim and the process for claiming none of which he had previously been aware of.*

*In January 2021, John was told that he had now had advanced stage 4 cancer and he became concerned for his family. Citizens Advice suggested he look at his life insurance policy to see if he could use it to pay off his mortgage to make them more secure which he was able to do. It was also in January that he married his partner.*

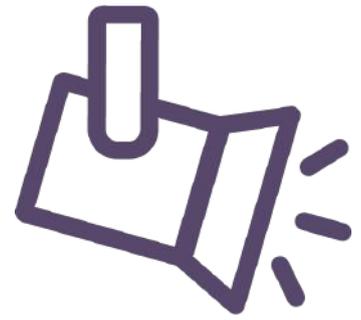
*He was in and out of hospital over the next few months and was finding it harder to manage his benefits. His Macmillan adviser was able to help with digital applications and to advise on disability benefits for one of his children and Carers Allowance for his wife. One of his claims was complicated by him having been self-employed. However, with his permission, Citizens Advice was able to liaise with HMRC, resolve the situation and the benefit was awarded.*

*Throughout his treatment and in all his dealings with the Citizens Advice Macmillan Project, John was unfailingly upbeat, wanting only to ensure a safe future for his family and was always thankful and full of praise for the help and advice he received from his advisers.*



# Spotlight on...

## Our Services in East Dorset and Purbeck



In April 2020 when the new financial year began the nation was in its first ever lockdown, we were enjoying an unseasonably warm spring and the use of the word 'unprecedented' became decidedly..... well, unprecedented.

With the spectre of a national lockdown looming as we neared the end of March 2020, both East Dorset Citizens Advice and Purbeck Citizens Advice had managed, in what was a matter of days, to successfully plan and put into practice what would be a new way of working. Both volunteers and paid staff were set up to work remotely; the necessary equipment was acquired, health and safety assessments carried out, new systems were put in place and offices and outreaches effectively closed down.

One of our greatest strengths as a service has always been our ability to deal with change; whether it be the issues with which people come to us, changing governments and legislation or, as it turns out, a complete change in the way we live our lives. We, as a service to what is a mainly rural area, had been taking steps to review and adapt the way to deliver our service most effectively by adopting a more flexible approach. This had become a sudden, enforced reality.

Our staff, both paid and volunteer, rose to this new challenge, accepted the huge technical and practical demands and met them with good humour, tolerance and an indefatigable sense of goodwill, and a commitment to carry on providing a great service to our local residents. The statistics speak for themselves. In the year 2019/2020 we dealt with 4,904 clients of which 32% were seen face to face and in 2020/2021 we dealt with 5,398 clients of which just 3% were seen face to face, the remainder being dealt with mainly by telephone and email with some by letter and some using a video platform.

In addition to this over 5,000 calls were dealt with by Dorset Adviceline which is accessed using a freephone number and is answered on a rota basis by volunteers from the three Citizen Advice offices in Dorset: Bridport, Central, and East Dorset and Purbeck.

In April 2020 we successfully instigated a pilot scheme to manage our commitment to the Dorset Adviceline rota by forming an Adviceline team with its own supervisor. We also started providing debt advice via our MaPS funded debt advisers, became key participants in the Dorset Citizens Advice Employment Unit and recruited staff to participate in the housing and employment strands of the Access to Justice funded Litigant in Person scheme. This all in addition to the many funded projects we also run.

What is particularly gratifying to note is that despite the huge changes that we have had to assimilate throughout the last year these have not impacted the quality of the service we have been able to provide to our clients. As before the pandemic, our Quality of Advice Assessments and feedback from clients remain excellent.

contd.

## Spotlight on...

Not to rest on our laurels, in the midst of the pandemic and initiated by the retirement of the East Dorset Manager, the two separate services of East Dorset and Purbeck took first steps towards becoming one organisation.

In a time of social distancing, what is never an easy process was made that much more difficult. Morning zooms with staff and monthly team meetings helped bring some sense of personal contact and familiarisation but it has not been easy. As the challenges of lockdown were being managed, we now had to consider the myriad of issues presented in aligning different IT systems, offices, work practices and equipment, merging, adapting and rebranding. How much we relied on the continuing dedication and forbearance of our staff whilst this was on-going cannot be understated.

In April this year with the formal merger of the two organisations, we became Citizens Advice in East Dorset and Purbeck. As we have moved into the new fiscal year we are aware that many challenges still lay ahead but feel confident that we will be able to meet these challenges with the same robustness as the year just gone.

**Judy Herring**  
**Advice Service Manager**



# Research & Campaigns - Working to Prevent Problems

While most of East Dorset and Purbeck Citizens Advice work is focussed on helping to solve individual client's problems, we are also occupied with trying to prevent them occurring in the first place. This is our Research and Campaigns (R&C) work and is informed by the experiences of our clients; locally, county-wide and nationally. There are two main ways of preventing the problems. There are those that are directed towards showing people how they can avoid them, and those that are directed towards changing the very regulations and services at their root.

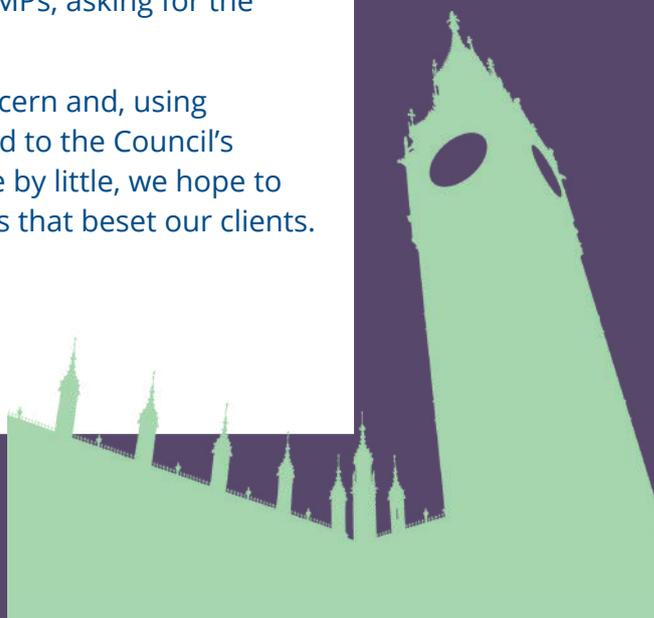
We have built on our previous ways of educating and warning people by an increased social media presence and press coverage. Some subjects are linked with Citizens Advice national campaigns, like Scams Awareness and Energy Saving and some reflect local concerns such as the closure of bank branches and the little-known alternative of using the Post Office.

Advisers write evidence forms when they come across an unfair regulation or service and 244 were recorded by us in 2020/21. A high proportion were on universal credit (UC), so we now have regular on-line liaison meetings with Jobcentre Plus where we raise issues, learn how their system works and achieve better communication.

As a temporary measure, each claimant's UC was increased by £20 a week at the start of the pandemic. Benefit levels are low and about a third of claimants have reductions, for example paying off UC Advances. So, Dorset R&C has written and met some Dorset MPs, asking for the uplift to be permanent.

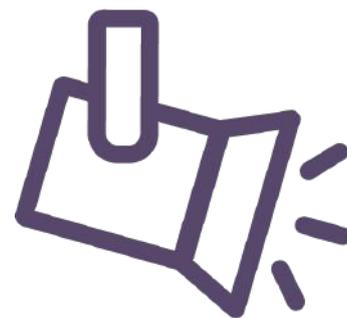
Housing and homelessness are other areas of concern and, using feedback from our advisers, Dorset R&C responded to the Council's consultation on their Homelessness Strategy. Little by little, we hope to influence and improve the services and regulations that beset our clients.

**Rosemary Lunt**  
**Research and Campaigns**



# Spotlight on...

## Winter Warmth Support



Dorset Council asked us to manage and deliver their Winter Warmth Support (WWS) grants to households living in the Dorset Council area. A total of £182,940 was provided by Dorset Council to issue grants of £200, primarily to support families impacted by Covid-19 with some support available to individual households.

The eligibility for the grant was fairly broad, with the main criteria being that households had been impacted by Covid-19 through reduced income (loss of employment, reduced hours, etc) or through additional costs due to home-schooling and working.

We organised delivery of these grants to 886 households, with Citizens Advice across Dorset then providing onward advice to 410 households that needed it. The grants were in the form of either cash or energy vouchers, as well as white goods for cooking / storing food if the household had an urgent need for this. The majority of the grants were issued as cash vouchers, with some being provided as energy vouchers and 10 households were provided with a cooker / fridge.

Online applications accounted for 85% of the applications, with 3% using the phone to apply. However, despite the relatively low number using the phone it meant that those without internet access were not excluded from applying for the grant. A further 12% of recipients were existing Citizens Advice clients who were identified as being eligible and then referred internally for WWS support.

We also worked in partnership with BCP Citizens Advice in the delivery of the BCP Council Winter Support grants. We assisted them in the delivery of £140,000 in grant funding to over 900 BCP residents. The grants worked in a very similar way to those in Dorset Council, this harmonisation greatly helped as it meant all households in Dorset had access to support if they needed it. With our energy advice project, Fighting Fuel Poverty, working with clients across both council areas, this also enabled referrals to be made into that to ensure that households across Dorset had access to advice as well as financial support.

**Kate Pryce**  
**Project Manager**



# Keeping Everyone Up-to-date

Keeping local residents informed about how to contact us was key throughout the pandemic. During the first lockdown, we communicated our change in opening hours and accessibility via social media, media relations – including parish magazines and local newsletters in our region, and via our website. We also created posters and leaflets ensuring that residents knew how to access help when we were unable to offer face-to-face appointments.

Following the merger of East Dorset and Purbeck Citizens Advice, a new website was created [www.edpcitizensadvice.org.uk](http://www.edpcitizensadvice.org.uk) and new Twitter and Facebook accounts **@CitAdviceEDP**. The purpose of the website was two-fold – to act as an information source for residents and also to provide staff and volunteers with access to internal information via the Portal. The website's new Virtual Adviser function allows clients to access a wealth of self-help information including links to local support organisations. This function will be further developed during 2021-2022.

We promoted the Dorset Council/Dorset Adviceline Reaching Out campaign to help those affected by the pandemic and have worked closely with Research & Campaigns on key campaigns including #Keepthelifeline – supporting the £20 UC uplift; Scams Awareness - working with Trading Standards to generate awareness of scams, how to report them and not fall victim to a scam; and the Big Energy Saving Winter campaign – helping people to cut energy costs and get financial support. Campaigns were promoted through social media and website. Press coverage was generated in key local publications (online and print) and local radio stations including BBC Radio Solent.

Looking to 2021-2022, we will be focussing on Equality, Diversity and Inclusion (EDI) whilst ensuring that our services are accessible to all residents, including those currently under-represented. We will be targeting these groups through new social media platforms – including Instagram and TikTok to reach younger people – and relevant marketing material.

**Sian Smith**  
Communications Officer



# Financial Review

The merger of East Dorset Citizens Advice and Purbeck Citizens Advice took place on the 1st April 2021. The financial review therefore shows the financial position for East Dorset and Purbeck in line with the separate annual accounts that are legally required, however, the figures have been consolidated for this Annual Review.

## **East Dorset Citizens Advice Financial Review 2020/2021**

This was a very difficult year to monitor the budget due to the pandemic with a number of additional grants being received and reductions in certain items of expenditure due to the office closure and home working. The Trustees continued to meet remotely and were updated throughout the year.

The East Dorset Citizens Advice budget as approved showed a deficit of £14,380 and at the end of the year there was a budget surplus of £17,776 a turnaround in the year of just over £32,000. This was achieved by increased income relating to COVID, MASDAP debt trainee, IT equipment and other small grants, savings on office expenditure and premises, offset by increased expenditure on staffing, IT equipment and personnel advice. The general reserve at the 1st April 2020 which is the free reserves of the charity, was £103,681 of which £7,473 relates to income received in advance. After taking into account the surplus for the year of £17,776 and the contribution from the legal liabilities reserve of £9,715, the general reserve at the 31st March 2021 was £123,342 of which £14,226 relates to income received in advance.

## **Purbeck Citizens Advice Financial Review 2020/21**

The accounts for Purbeck Citizens Advice for the year ended 31st March 2021 show a surplus of £46,763. This is an increase over the surplus of £24,969 achieved in 2019/20 and a variance of £83,713 compared to the original 2020/21 budget deficit of £36,950. The 2020/21 financial year was not a normal year and any comparison with past years will be both difficult and have little value.

The surplus of £46,763 has been achieved through the generation of additional income from charitable activities with a corresponding but smaller increase in spending. Many of the new grant funded projects were awarded in the second half of the year. The grant income variance compared to the 2020/21 budget was £712,714 whilst salary costs increased by £151,195, operational costs increased by £53,463 and third-party payments by £423,426. Governance costs fell by £556.

Purbeck Citizens Advice was awarded the county lead for the Fighting Fuel Poverty project. This is a two-year project that commenced in July 2020 with total funding of £351,586. This project incorporated the Surviving Winter scheme previously managed through Citizens Advice in Dorset (CAiD). Dorset Community Foundation (DCF) continued to support this project with matched funding of £25,000, allowing direct financial support of £50,000 to individual households towards their energy costs. This is in addition to the stand-alone Surviving Winter grants programme which allowed the distribution of 173 individual energy support grants across the county.

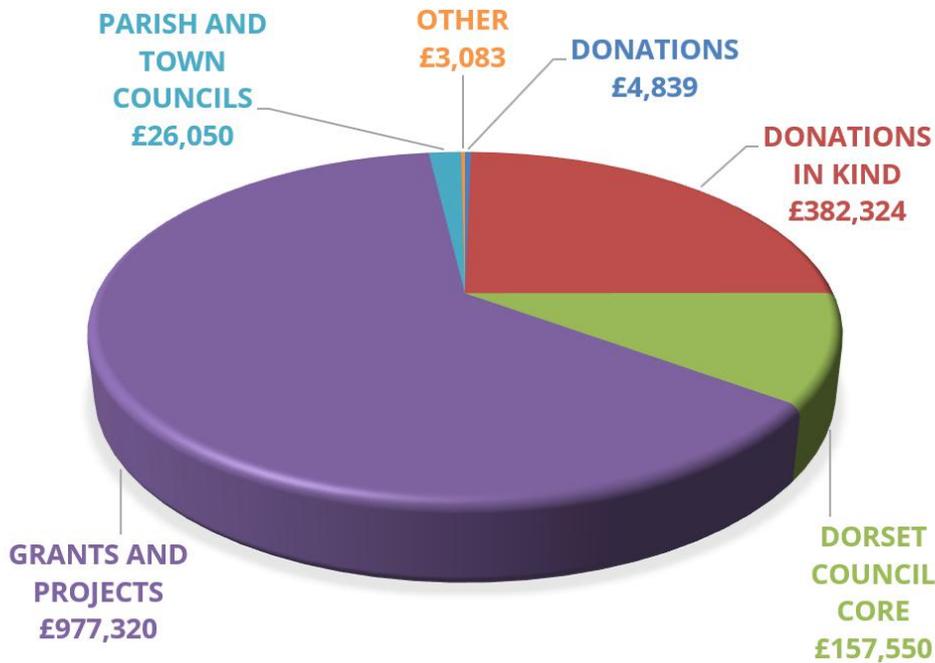
2020/21 has seen an overall increase in reserves of £46,763. The general reserve has increased by £21,460, designated reserves by £19,000 and restricted reserves by £6,303.

These reserves, along with other balance sheet assets and liabilities, have been merged with East Dorset Citizens Advice, enabling the new organisation to have a sound financial base for facing future challenges. The Trustees of Citizens Advice in East Dorset and Purbeck will undertake a full review of the reserves as part of the development of the new organisation.

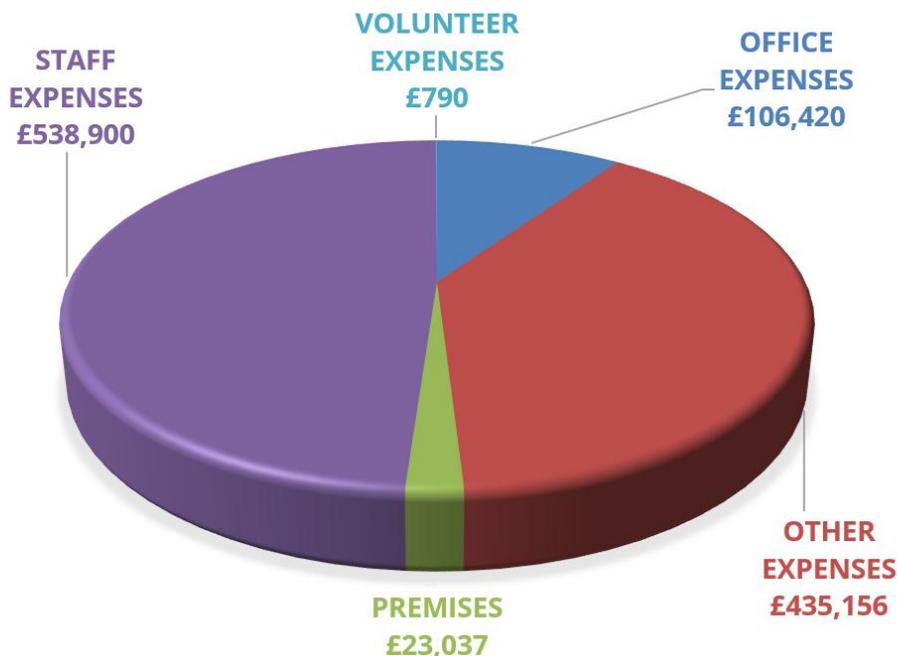
**Alan Breakwell**  
East Dorset Treasurer

**Stephen Parker**  
Purbeck Treasurer

## How you gave your help



## How your support helped



The total income across East Dorset and Purbeck for 2020/21 was £1,551,166 including £382,324 in time donated by volunteers. The total expenditure for 2020/21 was £1,104,303.

# Clients say...

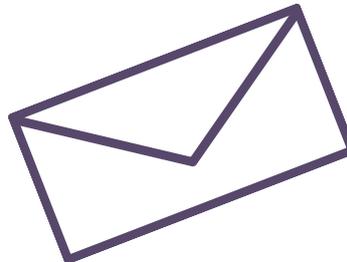
*Thank you truly for all your help and your ongoing help. Without you, I'm not sure how we could have managed.*

*The person I spoke to was very helpful and good at explaining the help.*

*Excellent provider of information able to put me in touch with colleagues who had specific knowledge and experience in the necessary fields.*

**THANK  
YOU**

*Amazing and understanding staff. I wasn't made to feel embarrassed asking for advice and help. They all made me feel really at ease the whole time.*



*Wonderful, kind, helpful staff*

*I found everyone I spoke to, to be kind and courteous and at pains to help, from the initial volunteers to the dedicated experts.*



# Thank you to our supporters

## Councils

Dorset Council  
Town and Parish Councils (x17)

Friends of East Dorset Citizens Advice

Swanage and Purbeck Rotary  
Verwood Rotary  
Wareham Lions Club  
Wimborne and Ferndown Lions  
Wimborne Rotary

## Patron

Lord Cranborne

## Project-funding

Dorset Community Foundation  
Energy Saving Trust  
The Henry Smith Charity  
Macmillan Cancer Support  
Nationwide Building Society  
Valentine Trust  
Wessex Water

## Special Thanks

To the many individual and other donors who have given so generously over the course of the year. Thanks also to the many individuals and businesses who have supported us in different ways by donating their time, expertise and resources.



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